

2012 Application

User Guide for eGrATIS

June 2011

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Application 2012 User Guide for eGrATIS

I. Introduction

This User Guide is intended to provide steps for completing your Grant Application and preparing your Budget, Project Narratives and SF424A for Grants.gov.

All data shown in images or examples are for illustration purposes only.

What is eGrATIS?

eGrATIS (Electronic Grants Application Tracking Information System) is a web-based application developed for use by Grantees for preparation and submission of their federal grant budget application for funding their immunization program. eGrATIS is hosted on a Secure Data Network (SDN) server to insure the safety of the entered Sensitive but Unclassified data.

Creating your 2012 Grant Application

The Application module supports the creation of your Application objectives and budget within PGO and POB guidelines. The eGrATIS Application is a **tool** for you to create your Project and Budget Narratives for upload to Grants.gov.

➡ *Submitting in eGrATIS indicates that you have completed your application and the eGrATIS generated documents are ready for upload to Grants.gov*

Official submission through Grants.gov

After you have completed and submitted (finalized) the Application in eGrATIS, you will then download the Budget Justification, Workplan Details, and SF424A reports from Application. You will also download the Mid Year Progress report from the Mid Year Progress Report module. (See User Guide – Grantee – Mid Year Progress Report.)

These reports are already in PDF format. Submit these documents into Grants.gov as part of Interim Progress Report submission.

Who may do what in this system?

Your local Program Manager determines who will use eGrATIS, as well as what role you will have. This may include view-only or create and edit ability in different parts of the system. (If you have Super User role for Application module, you will also have it for the Mid Year Progress report module. There is a separate user guide for Mid Year Progress Report.)



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User Level	You may...
Super User	View and edit the entire application (including Budget and Objectives). Submit the application to CDC.
User Level 1	View and edit the entire application (including Budget and Objectives). <i>Cannot</i> submit the application to CDC.
User Level 2	View and edit Objectives.
User Level 3	View and edit Budget. View (but not edit) Objectives.
User Level 4	View (but not edit) the entire application.

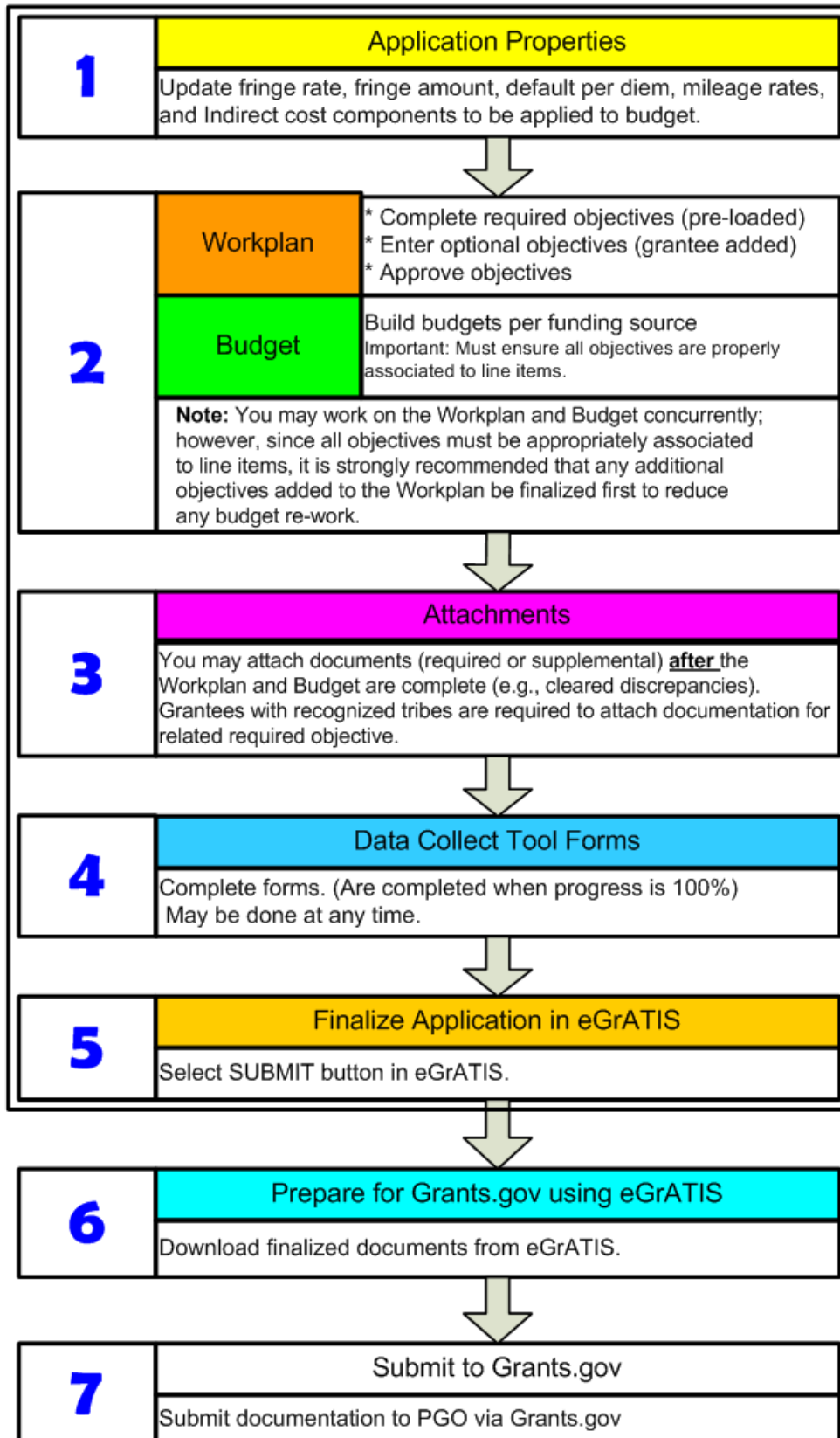


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eGrATIS Application - Recommended Workflow

The following workflow is suggested for creation and submission of the grant application. You will need to complete you application properties, a budget, and workplan.

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Application 2012 User Guide for eGrATIS

The eGrATIS Application is a **tool** for you to create your Project and Budget Narratives for upload to Grants.gov. In addition it assists in the preparing the SF424A and additional items of submission, such as the IIS Business Plan.

Submitting in eGrATIS indicates that you have completed your application and the eGrATIS generated documents are ready for upload to Grants.gov. The Project Officers will later use the information you created in eGrATIS to review your grant application.

Step 1: Application Properties

The Properties includes two functions:

- Setting the defaults for added line items
 - o Personnel (Fringe %, Fringe \$)
 - o Travel (per diem, mileage rates)
- Creating your Indirect cost component settings. Indirect cost component settings are used by the system to calculate indirect line items for you.

NEW! Indirect cost components

The ability to create indirect cost components in the eGrATIS is new this year.

The settings you enter will generate your Indirect line items.

You may return to Properties any time before selecting the submit button to adjust default values or Indirect cost components.


Step 2: Workplan and Budget

The Workplan, Budget and Data Collection Tools can be worked on concurrently. Note that the Workplan is pre-loaded with IPOM Required Objectives. You may enter additional Optional Objectives. If you are going to enter additional objectives to the workplan, it is strongly encouraged that you do this first so the person working on the budget may associate the line items to these objectives as they are working on the budget.

eGrATIS focuses on building budgets by funding sources. So you might build your 317 OPS/Personnel budget, then your VFC OPS/Personnel budget and so forth. You would build the budget for each budget category (a.k.a., object class) and funding source pair.

Though eGrATIS displays line items by individual Funding Source/Budget Category pair (e.g., 317 OPS/Personnel), a line item may be funded by more than one funding source. The system provides functionality to search and add a line item so you do not have to re-create the same line item in another funding source. For example, create a Personnel line item in one funding source (e.g., John Doe for \$56,850 in VFC OPS/Personnel list). Indicate how much he will be funded from that funding source (e.g., \$25,300 VFC OPS funds). Go to another funding source (e.g., VFC AFIX). John Doe will not be listed as a Personnel line item for this funding source. Search and add this existing line item to the VFC AFIX/Personnel list. The line item is pulled in with its existing information to the VFC AFIX/Personnel line item list. Then you would indicate how much he will be funded from that funding source (e.g., \$31,550 VCF AFIX funds). This results in one line item (John Doe) funded by two funding sources (VFC OPS and VFC AFIX).

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-  Note: Since certain funds can only support certain Objectives, you must indicate which objectives the line items supports for each funding source. For example, one activity John Doe will be doing is conducting site visits. This activity is supported by VFC AFIX funds but not VFC OPS. So you would indicate this on John Doe in the VFC AFIX/Personnel line item list. (See *IPOM Chapter 0 – The Basics for more information on Allowable Expenses with Categorical Funding.*)

Step 3: Attachments

After the Workplan and Budget are complete, you may attach documents.

If you are a grantee with federally and/or state recognized Tribes, the system will require you to attach a document for attachment type “Chapter 1 – Tribes”.
(See *Chapter VI section C and Chapter XI*)

You may also attach additional supporting documents to your application.


Step 4: Data Collection Tool Forms

Data Collection Tool forms were introduced to eGrATIS last year. These are survey forms that will ask you to select an answer and/or enter information. All questions must be answered for a form to be considered completed. The forms are:

- IIS Business Plan
- VFC and AFIX Site Visit Tables (*Not applicable if you do not receive VFC funds*)

Step 5: Finalize Application in eGrATIS

When the Budget, Workplan, Attachments, and Data Collection Tools are complete you will select the submit button for the eGrATIS application module.

-  Submitting in eGrATIS indicates that you have completed your application and the eGrATIS generated documents for Project and Budget Narratives and the SF424A are ready for Grants.gov.

These finalized documents should then be uploaded to Grants.gov as part of your official application submission.

Step 6: Prepare for Grants.gov using eGrATIS

Download the following PDF reports which represent your Project and Budget Narratives:

- Application Module
 - o Budget Justification
 - o Workplan Details
 - o SF424A
- Mid Year Progress Report Module
 - o Mid Year Progress Report

Step 7: Submit to Grants.gov

This occurs outside of eGrATIS. Please follow instructions for that system.

II. What's New? (Changes to eGrATIS Application)

Application 2012 has been updated to satisfy both business and usability needs. This year the system now includes:

System Generated Indirect Line Items based on User Defined Cost Components

In prior years, The Indirect Rate was shown as information only and not used in calculating the Indirect line items.

In Application 2012, the Properties page has been redesigned to include the ability to create multiple Indirect Cost Components which the system will use to generate the Indirect line items.

Note: The Properties page continues to include the ability to update Default Rates and Amounts for Fringe Rate, Fringe Amount, Per Diem Amount and Mileage Rate to be used in line item calculations.

Note: Indirect is not calculated for Vaccine budget category or DA line items.

Before entering the Budget, the system will request you to update the Properties page. At this time you should enter the default rates and amounts as well as the Indirect Cost Components.

You may update the Default Rates and Amounts, as well as the Indirect Cost Components at a later time if needed. If updating Fringe Rate, Fringe Amount or Per Diem, you will be given the opportunity to indicate if existing and/or new line items are to be updated.

Please see the Application Properties section (VI. Add Application Properties) for step-by-step instructions on how to manage both the Default Rates and Amounts and the Indirect Cost Components.

III. *Helpful Tools*

Search and Load 2011 Line Items

The system provides the ability to perform a search and add a line item from last year's application.

- Line item details (e.g., Name, Title, etc.) will be copied in.
- The line item will initially be set to \$0. Adjust for this year's amount.
- Since workplan objectives differ from last year, the association to objectives is **not** copied over from last year. You will need to associate to this year's objectives.

Copy Line Items from one Funding Source to Another

Because line items are now viewed by Funding Source/Budget Category pairs, this feature allows you to copy in a line item you created in another funding source. This assists when a line item is funded by more than one funding source. For example, you created a Personnel line item in one funding sources (e.g., John Doe for \$56,850 using VFC OPS). He is funded partly by VFC OPS (e.g., \$25,300). He is also funded by FVC AFIX. Go to this funding source for Personnel. John Doe is not listed. Search and add this existing line item. The line item is pulled in with its existing information (e.g., John Doe for \$56,850). Now you will have to indicate how much he will be funded from that funding source (e.g., \$31,550 of VCF AFIX).

i Note: When copying a line item to another funding source, the objectives selected for the line item are NOT copied. Since certain funds can only support certain IPOM requirements, you must indicate which objectives the line items supports for each funding source. For example, John Doe will be conducting site visits. This activity is supported by VFC AFIX funds but not VFC OPS. (See *IPOM Chapter 0 – The Basics for more information on Allowable Expenses with Categorical Funding.*)

Budget Line Item Funding Breakout

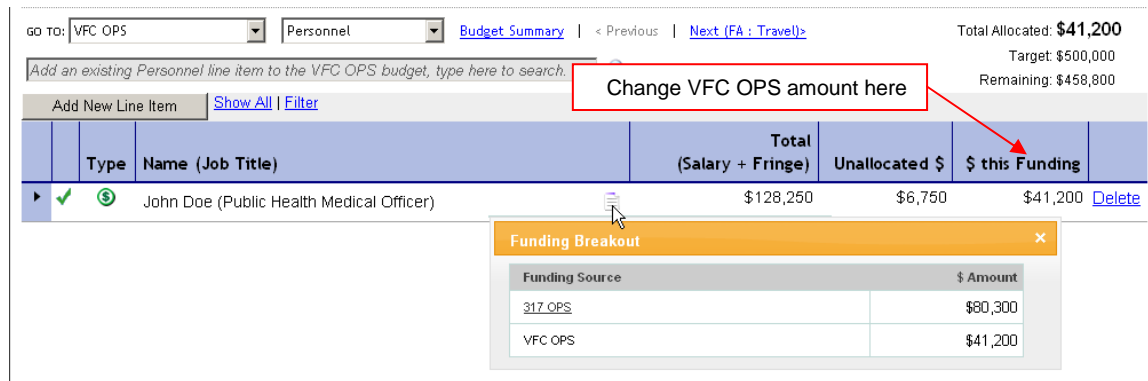
You may have a line item funded by multiple funding sources. Because line items are now viewed by Funding Source/Budget Category pairs, you would have to switch to each funding source for the given budget category to make edits to the amount allocated.

The Funding Breakout on the line item provides both the ability to change other funding source allocated amounts from one line item or switch to that same line item in another funding source.

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Change Allocation Amount:

In the example below, you are viewing VFC OPS/Personnel line items. John Doe is funded by both 317 OPS and VFC OPS. There is \$6,750 left to allocate.



GO TO: VFC OPS Personnel [Budget Summary](#) | [Previous](#) | [Next \(FA : Travel\)](#) Total Allocated: **\$41,200**
 Target: \$500,000
 Remaining: \$458,800

Add an existing Personnel line item to the VFC OPS budget, type here to search.

Add New Line Item [Show All](#) | [Filter](#)

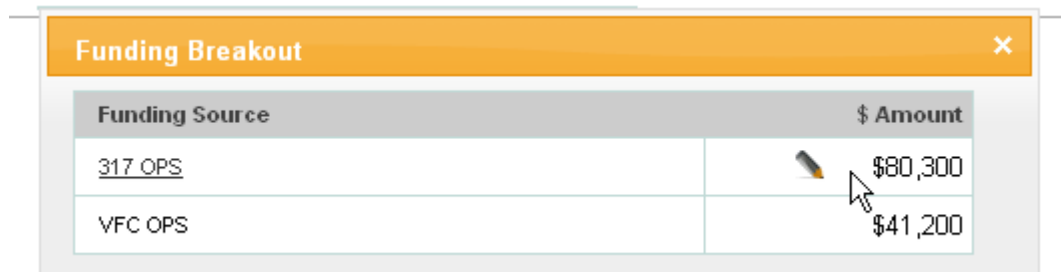
Type	Name (Job Title)	Total (Salary + Fringe)	Unallocated \$	\$ this Funding
✓	John Doe (Public Health Medical Officer)	\$128,250	\$6,750	\$41,200 Delete

Funding Breakout

Funding Source	\$ Amount
317 OPS	\$80,300
VFC OPS	\$41,200

You may change the VFC OPS amount from the line item itself using the “\$ this Funding” field.

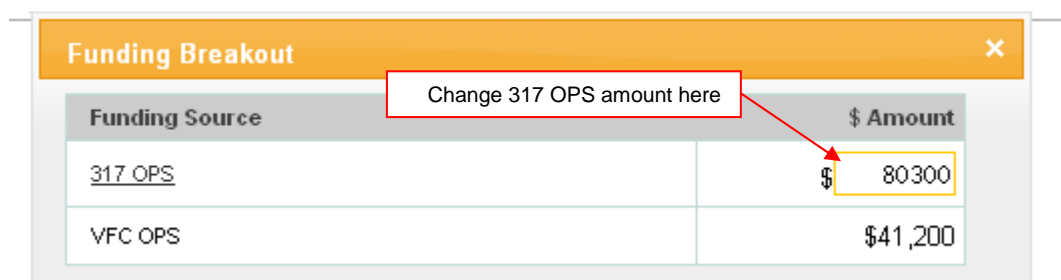
Place your cursor over the 317 OPS amount in the Funding Breakout. You will see a Pencil Icon.



Funding Breakout

Funding Source	\$ Amount
317 OPS	\$80,300
VFC OPS	\$41,200

Select the Pencil Icon to update the 317 OPS amount.



Funding Breakout

Funding Source	\$ Amount
317 OPS	\$ 80300
VFC OPS	\$41,200

The system will adjust the “\$ this Funding” in the 317 OPS/Personnel view and adjust the “Unallocated \$” amount.

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	Total (Salary + Fringe)	Unallocated \$	\$ this Funding
	\$128,250	\$0	\$41,200

Funding Breakout	
Funding Source	\$ Amount
317 OPS	\$ 87,050
VFC OPS	\$41,200

Change saves; Unallocated \$ adjusts

Switch to Line Item in Other Funding Source:

Switch to the same line item in another funding source by selecting the Funding Source link in the Funding Breakout.

	\$128,250	\$6,750	\$41,200
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Funding Breakout	
Funding Source	\$ Amount
317 OPS	\$80,300
VFC OPS	\$41,200

Select the active funding source link.

The line item will open in the 317 OPS/Personnel view.

Workplan: Objective Funding Breakout

From the Workplan, you can view which line items and how much of which funding sources are tied to each objective. Before you can see this breakout, the objective must be associated to a funded line item.

To open the Objective Funding Breakout, first place your cursor next to the Total Budget amount for the objective to cause the icon to display.

2011 - 0512	* Educate hospitals on birth dose	\$0
2011 - 0601	* Increase teen coverage rates	\$41,665

Select the icon.

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The Funding Breakout opens showing the amount per funding source is budgeted for this objective.

2011 - 0601	* Increase teen coverage rates	\$41,665	Untouched	Chapter 6: Adolescents
2011 - 0602	* Juvenile facilities and agencies			
2011 - 0801	* Staff orientation			
2011 - 0802	* Clinical staff view			
2011 - 0803	* NCVIA			
2011 - 0901	* Congenital Rubella			

Funding Breakout	
Source	Line Item
Funding Source	Amount
317 OPS	\$8,705.00
VFC OPS	\$32,960.00

Select the Line Item tab. This view shows which line items are associated to the objective.

Below you will see that the “Increase teen coverage rates” objective is associated to “John Doe (Public Health Medical Officer)”. This line item is funded by 317 OPS and VFC OPS. A portion of these funds for this line item are budgeted toward this objective.

2011 - 0601	* Increase teen coverage rates	\$41,665	Untouched	Chapter 6: Adolescents
2011 - 0602	* Juvenile facilities and agencies			
2011 - 0801	* Staff orientation			
2011 - 0802	* Clinical staff view			
2011 - 0803	* NCVIA			
2011 - 0901	* Congenital Rubella			
2011 - 0902	* Case reports to			

Funding Breakout				
Source	Line Item			
Source	Category	Description	\$ Total	\$ Objective
317 OPS	FA-Personnel	John Doe (Public Health Medical Officer)	\$87,050.00	\$8,705.00
VFC OPS	FA-Personnel	John Doe (Public Health Medical Officer)	\$41,200.00	\$32,960.00

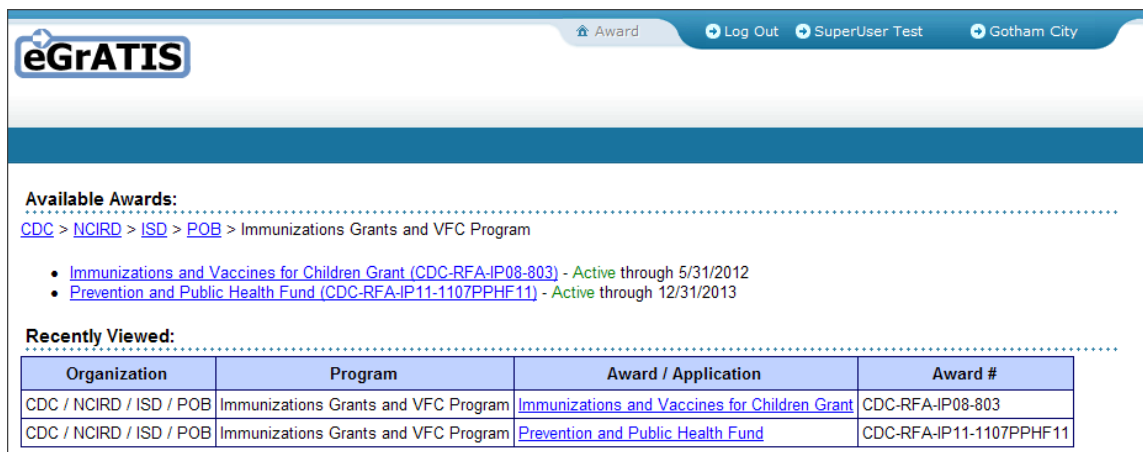
Select the active link to go to the line item for the given funding source.

IV. Access eGrATIS

You can only access eGrATIS if you have applied for and installed a CDC Secure Data Network (SDN) Digital Certificate and are given rights by the eGrATIS system administrator. If you do not have a certificate or access to eGrATIS, contact the SDN Helpdesk 1-800-532-9929, option 1. If you are unable to log into eGrATIS, please contact your Project Officer.

Steps to Accessing eGrATIS

1. Open your internet browser (e.g., Internet Explorer)
2. Enter the following web address: <https://sdn.cdc.gov>.
3. Press the 'Enter' key on the keyboard.
4. Ensure your digital certificate is selected in the 'Choose a digital certificate' screen and select OK. You will be taken to the login screen of the CDC Public Health Partners website.
5. Enter your Challenge Phrase (i.e., password). This phrase was created by you when applying for the digital certificate.
6. Select Submit. If submission is successful, you will be logged into the CDC Public Health Partners website. If you have any problems logging into the SDN site, please contact the SDN helpdesk at 1-800-532-9929, Option 1.
7. Select the "eGratis" link from the My Applications section to log into eGrATIS Home page.
8. Verify your name, user role level and grantee name (*See image on next page*)



Available Awards:

[CDC](#) > [NCIRD](#) > [ISD](#) > [POB](#) > Immunizations Grants and VFC Program

- [Immunizations and Vaccines for Children Grant \(CDC-RFA-IP08-803\)](#) - Active through 5/31/2012
- [Prevention and Public Health Fund \(CDC-RFA-IP11-1107PPHF11\)](#) - Active through 12/31/2013

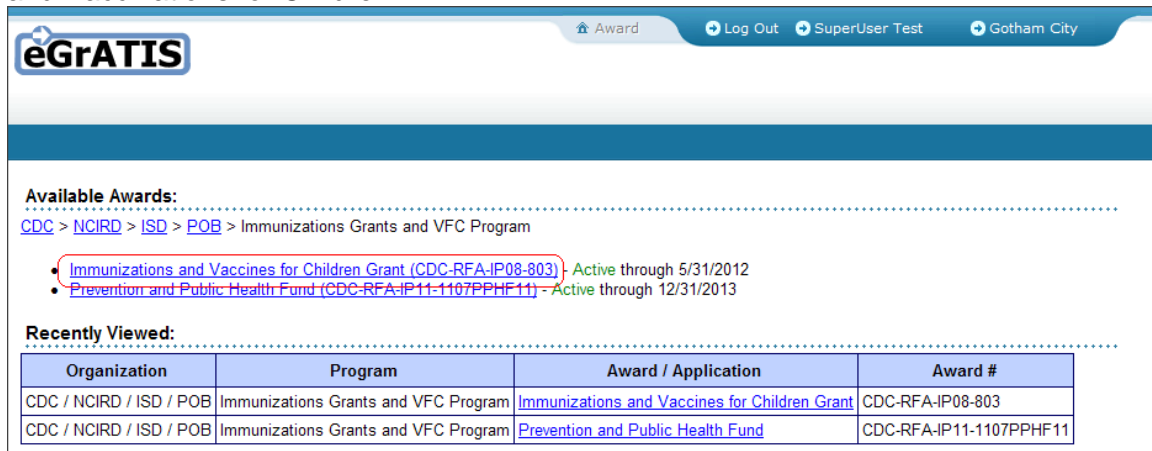
Recently Viewed:

Organization	Program	Award / Application	Award #
CDC / NCIRD / ISD / POB	Immunizations Grants and VFC Program	Immunizations and Vaccines for Children Grant	CDC-RFA-IP08-803
CDC / NCIRD / ISD / POB	Immunizations Grants and VFC Program	Prevention and Public Health Fund	CDC-RFA-IP11-1107PPHF11

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V. Access Application Module

1. On the Available Awards page, select the award you are applying for: Immunizations and Vaccinations for Children.



Available Awards:

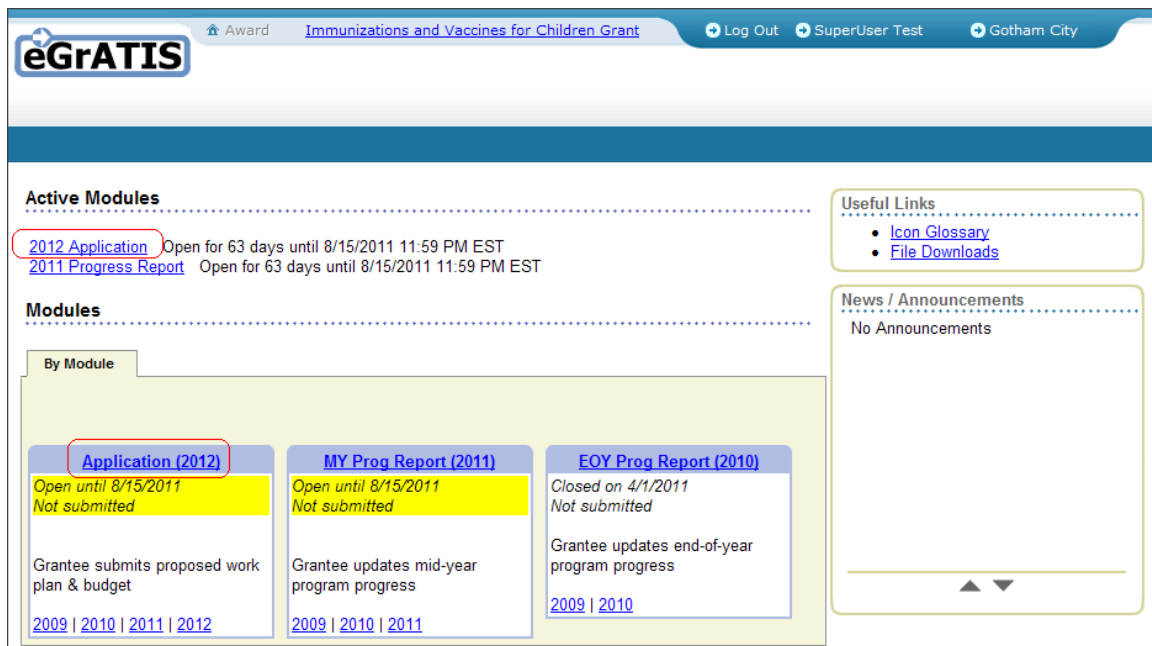
CDC > NCIRD > ISD > POB > Immunizations Grants and VFC Program

- Immunizations and Vaccines for Children Grant (CDC-RFA-IP08-803) - Active through 5/31/2012
- Prevention and Public Health Fund (CDC-RFA-IP11-1107PPHF11) - Active through 12/31/2013

Recently Viewed:

Organization	Program	Award / Application	Award #
CDC / NCIRD / ISD / POB	Immunizations Grants and VFC Program	Immunizations and Vaccines for Children Grant	CDC-RFA-IP08-803
CDC / NCIRD / ISD / POB	Immunizations Grants and VFC Program	Prevention and Public Health Fund	CDC-RFA-IP11-1107PPHF11

2. On the home page, select the 2012 Application link under the Active Modules or Modules area.



Active Modules

2012 Application Open for 63 days until 8/15/2011 11:59 PM EST

2011 Progress Report Open for 63 days until 8/15/2011 11:59 PM EST

Modules

By Module

Application (2012)	MY Prog Report (2011)	EOY Prog Report (2010)
Open until 8/15/2011 Not submitted	Open until 8/15/2011 Not submitted	Closed on 4/1/2011 Not submitted
Grantee submits proposed work plan & budget	Grantee updates mid-year program progress	Grantee updates end-of-year program progress
2009 2010 2011 2012	2009 2010 2011	2009 2010

Useful Links

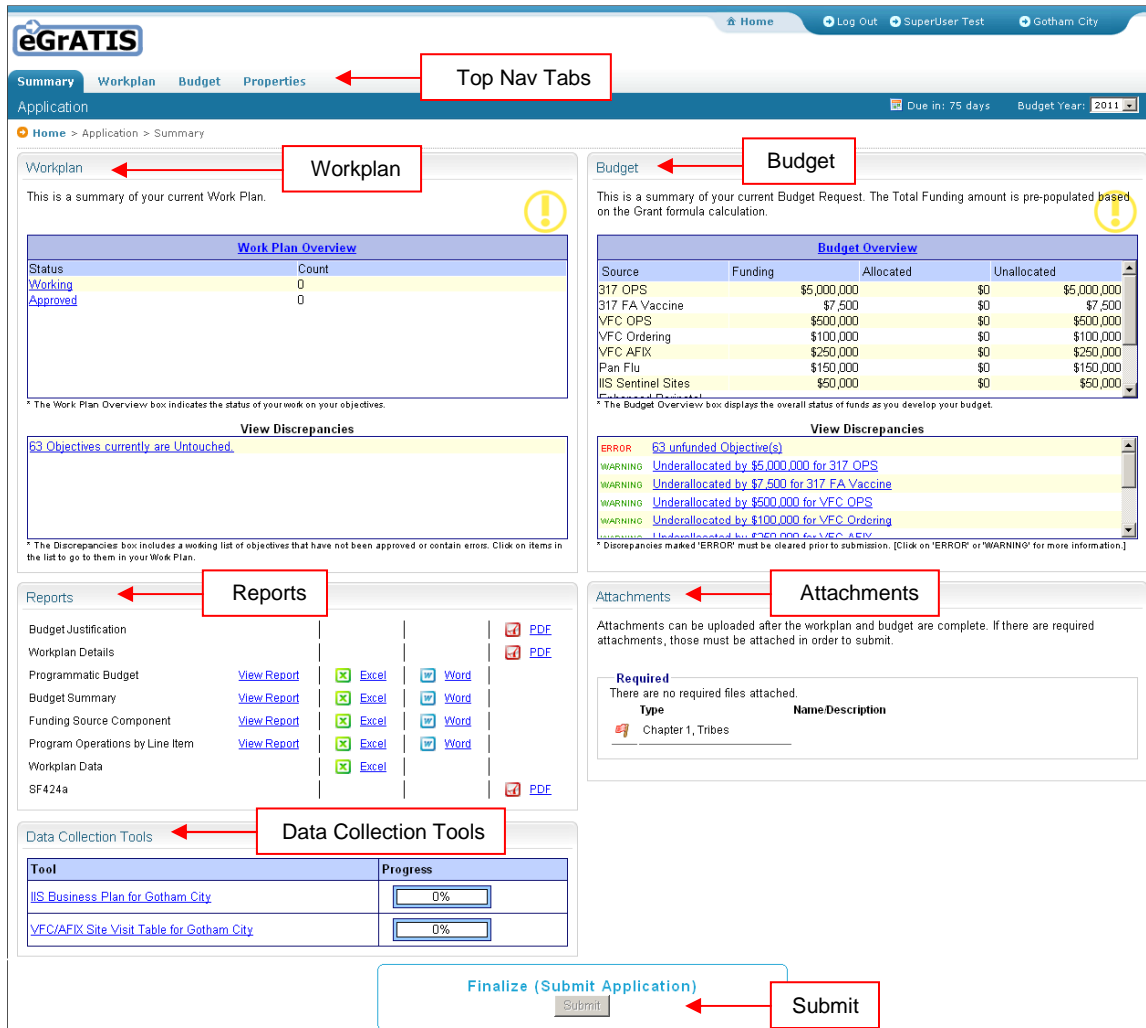
- Icon Glossary
- File Downloads

News / Announcements

No Announcements

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The Application Summary page displays. It provides the overall progress of your application as related to Workplan, Budget, Data Collection tool and Attachments required to complete the application.



Top Nav Tabs

Workplan

This is a summary of your current Work Plan.

Work Plan Overview	
Status	Count
Working	0
Approved	0

* The Work Plan Overview box indicates the status of your work on your objectives.

View Discrepancies

63 Objectives currently are Untouched.

* The Discrepancies box includes a working list of objectives that have not been approved or contain errors. Click on items in the list to go to them in your Work Plan.

Budget

This is a summary of your current Budget Request. The Total Funding amount is pre-populated based on the Grant formula calculation.

Budget Overview			
Source	Funding	Allocated	Unallocated
317 OPS	\$5,000,000	\$0	\$5,000,000
317 FA Vaccine	\$7,500	\$0	\$7,500
VFC OPS	\$500,000	\$0	\$500,000
VFC Ordering	\$100,000	\$0	\$100,000
VFC AFIX	\$250,000	\$0	\$250,000
Pan Flu	\$150,000	\$0	\$150,000
IIS Sentinel Sites	\$50,000	\$0	\$50,000

* The Budget Overview box displays the overall status of funds as you develop your budget.

View Discrepancies

ERROR 63 unfunded Objective(s)

WARNING Underallocated by \$5,000,000 for 317 OPS

WARNING Underallocated by \$7,500 for 317 FA Vaccine

WARNING Underallocated by \$500,000 for VFC OPS

WARNING Underallocated by \$100,000 for VFC Ordering

WARNING Underallocated by \$250,000 for VFC AFIX

WARNING Underallocated by \$150,000 for Pan Flu

WARNING Underallocated by \$50,000 for IIS Sentinel Sites

* Discrepancies marked "ERROR" must be cleared prior to submission. [Click on "ERROR" or "WARNING" for more information.]

Reports

Report	View Report	Excel	Word	PDF
Budget Justification				
Workplan Details				
Programmatic Budget	View Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Budget Summary	View Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Funding Source Component	View Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Program Operations by Line Item	View Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Workplan Data		<input checked="" type="checkbox"/>		

SF424a

Attachments

Attachments can be uploaded after the workplan and budget are complete. If there are required attachments, those must be attached in order to submit.

Required

There are no required files attached.

Type	Name/Description
	Chapter 1, Tribes

Data Collection Tools

Tool	Progress
IIS Business Plan for Gotham City	0%
VFC/AFIX Site Visit Table for Gotham City	0%

Finalize (Submit Application)

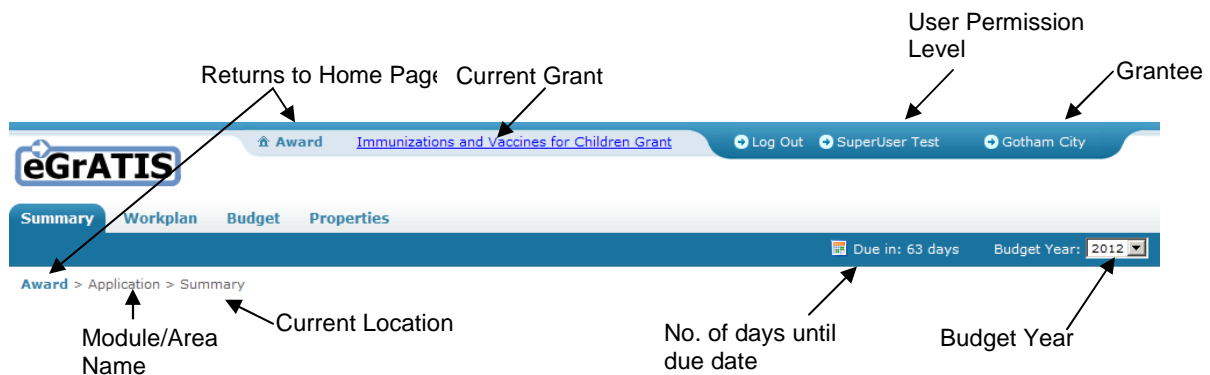
Submit

The following provides a brief description of the different parts of the Application page. Detailed instructions for each section are written in the latter sections of this instructional guide.

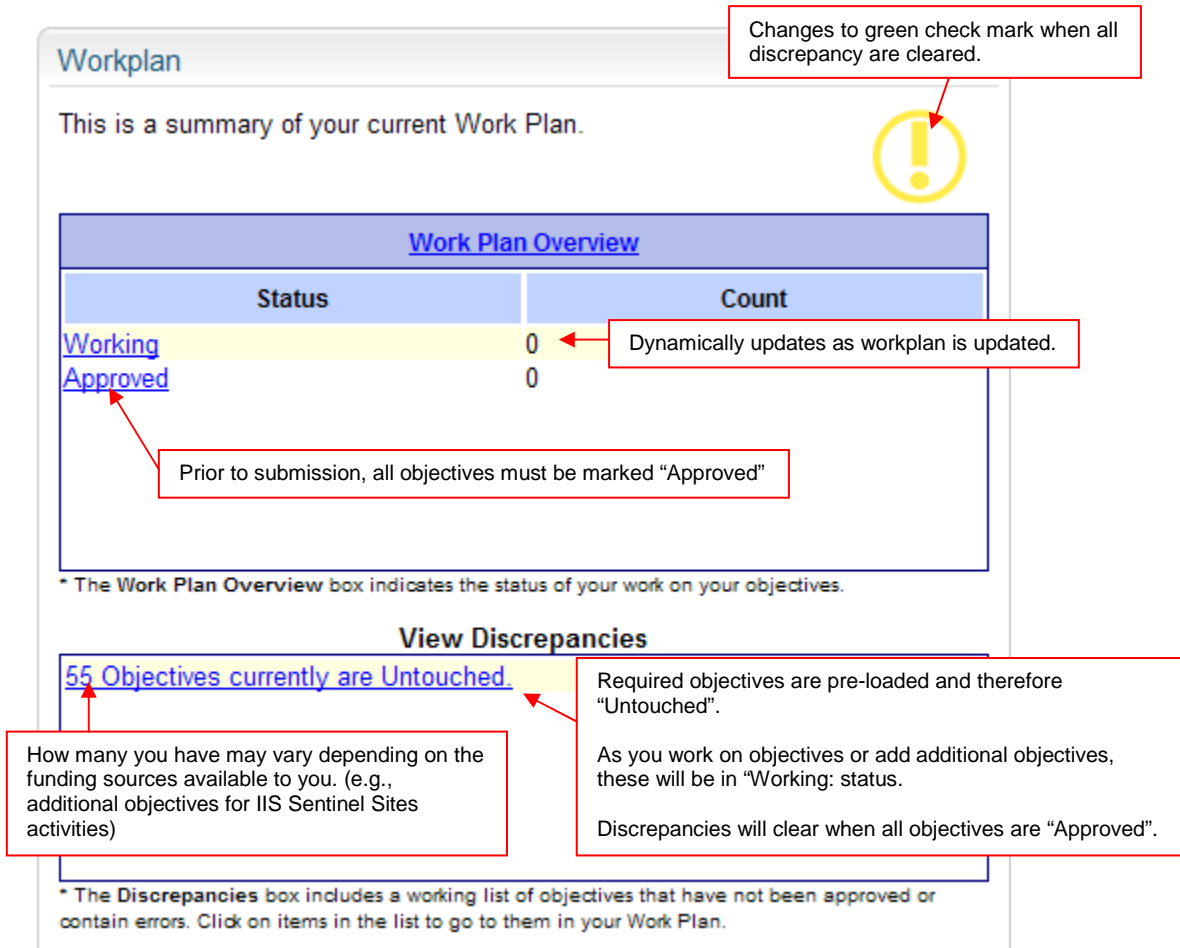
Note: Entries in Budget and Workplan are auto-saved when focus moves to another field (i.e., tab to another field) or another part of eGrATIS (i.e., move to another page).

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TOP NAVIGATION: This navigation displays at all times while in the Application.



WORKPLAN: The Workplan section provides an overview of the status of objectives created as well as any discrepancies that need remedied.



Workplan

This is a summary of your current Work Plan.

Work Plan Overview

Status	Count
Working	0
Approved	0

Annotations for the Work Plan Overview:

- Changes to green check mark when all discrepancy are cleared.** Points to a yellow warning icon.
- Dynamically updates as workplan is updated.** Points to the "Working" status row.
- Prior to submission, all objectives must be marked "Approved"** Points to the "Approved" status row.

* The Work Plan Overview box indicates the status of your work on your objectives.

View Discrepancies

[55 Objectives currently are Untouched.](#)

Annotations for the View Discrepancies section:

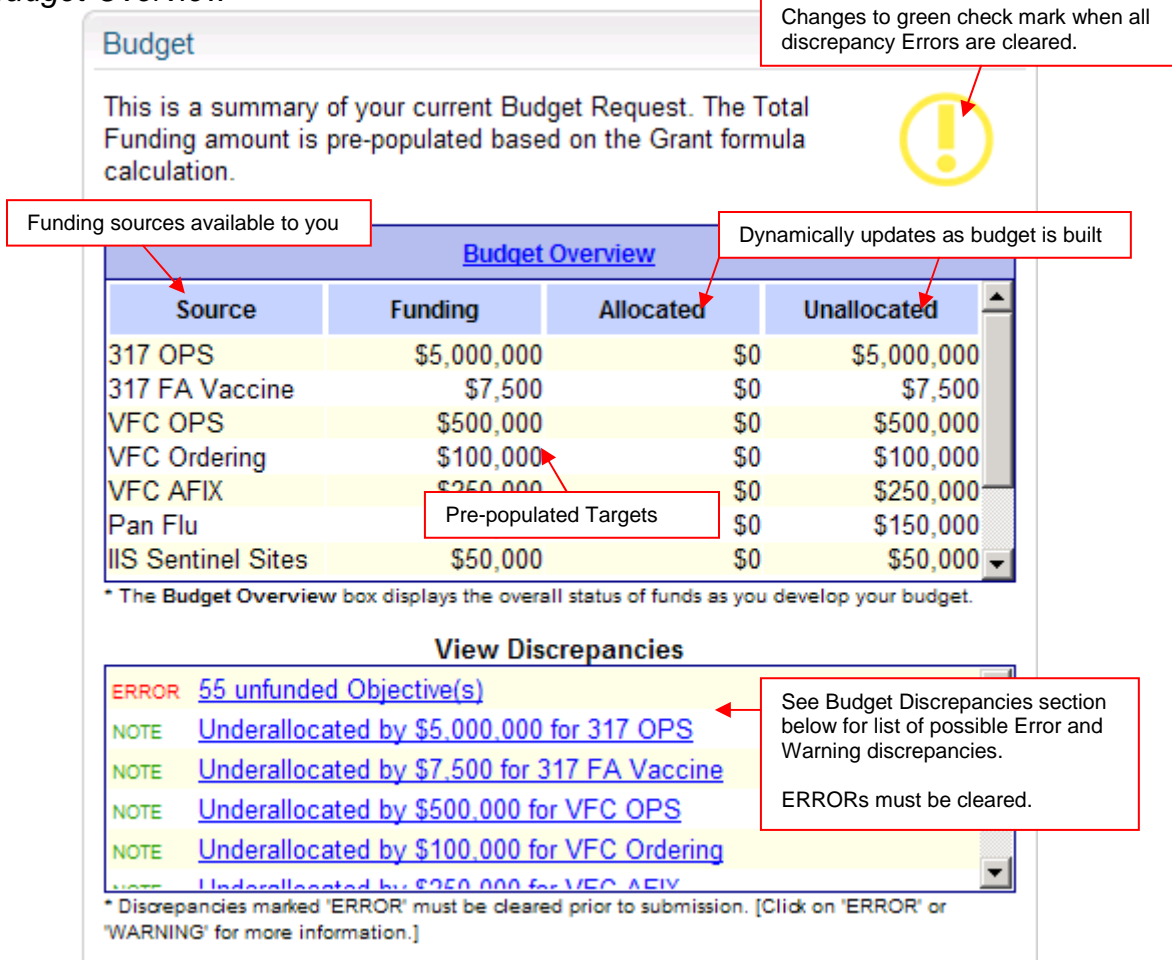
- How many you have may vary depending on the funding sources available to you. (e.g., additional objectives for IIS Sentinel Sites activities)** Points to the "55 Objectives currently are Untouched." link.
- Required objectives are pre-loaded and therefore "Untouched".** Points to the "55 Objectives currently are Untouched." link.
- As you work on objectives or add additional objectives, these will be in "Working: status."** Points to the "55 Objectives currently are Untouched." link.
- Discrepancies will clear when all objectives are "Approved".** Points to the "55 Objectives currently are Untouched." link.

* The Discrepancies box includes a working list of objectives that have not been approved or contain errors. Click on items in the list to go to them in your Work Plan.

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BUDGET: The Budget section provides an overview of the status of objectives created as well as any discrepancies that need remedied.

Budget Overview



Budget

This is a summary of your current Budget Request. The Total Funding amount is pre-populated based on the Grant formula calculation.

Changes to green check mark when all discrepancy Errors are cleared.

Funding sources available to you

Dynamically updates as budget is built

Source	Funding	Allocated	Unallocated
317 OPS	\$5,000,000	\$0	\$5,000,000
317 FA Vaccine	\$7,500	\$0	\$7,500
VFC OPS	\$500,000	\$0	\$500,000
VFC Ordering	\$100,000	\$0	\$100,000
VFC AFIX	\$250,000	\$0	\$250,000
Pan Flu		\$0	\$150,000
IIS Sentinel Sites	\$50,000	\$0	\$50,000

Pre-populated Targets

* The Budget Overview box displays the overall status of funds as you develop your budget.

View Discrepancies

ERROR 55 unfunded Objective(s)

NOTE Underallocated by \$5,000,000 for 317 OPS

NOTE Underallocated by \$7,500 for 317 FA Vaccine

NOTE Underallocated by \$500,000 for VFC OPS

NOTE Underallocated by \$100,000 for VFC Ordering

NOTE Underallocated by \$250,000 for VFC AFIX

* Discrepancies marked 'ERROR' must be cleared prior to submission. [Click on 'ERROR' or 'WARNING' for more information.]

See Budget Discrepancies section below for list of possible Error and Warning discrepancies.

ERRORs must be cleared.

Budget Discrepancies

The budget section also provides a list of discrepancies to assist you in knowing when you have completed the budget.

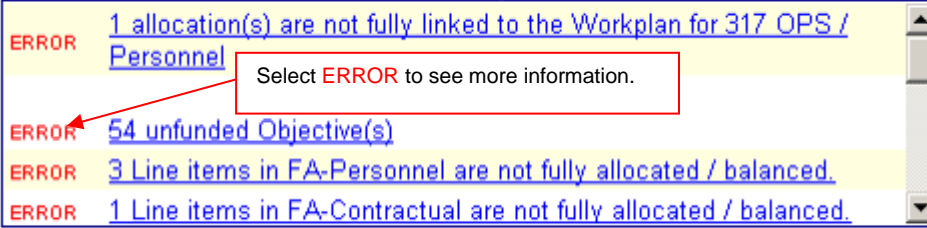
- Note:** When you copy 2010 line items into the 2012 Application, the associations to the Workplan objectives will not be copied and you will get the “not fully linked to the Workplan” discrepancy.

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Discrepancies are broken into two categories:

Error (Must be cleared for submission)

View Discrepancies

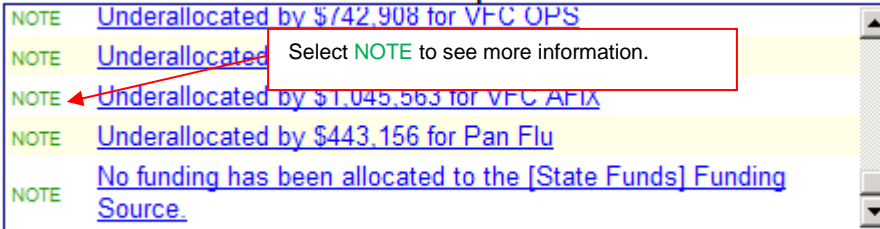


* Discrepancies marked 'ERROR' must be cleared prior to submission. [Click on 'ERROR' or 'WARNING' for more information.]


- “# allocation(s) are *not fully linked to the Workplan...*”
 - o A line item is not 100% associated to at least one Workplan Objective.
 - o If you have DA Personnel, these line items are pre-loaded for you. You will have to associate these allocations to Objectives.
- “# allocation(s) are *missing a Budget Justification...*”
 - o A line item is missing a budget justification.
- A funding source is *over-allocated* above the target amount.
- “X unfunded Objectives.”
 - o Objective(s) are not associated to any line item(s).
-  **Note:** You must ensure that all Objectives are funded by the budget. An Objectives tab within the budget provides the ability to map a line item to specific Objective(s).
- “# Line items in FA-Personnel are *not fully allocated / balanced.*”
 - o A line item exists but its total is not fully allocated to funding source(s).

Note (Informational only; Do not need to be cleared for submission)

View Discrepancies



* Discrepancies marked 'ERROR' must be cleared prior to submission. [Click on 'ERROR' or 'WARNING' for more information.]

- “Underallocated by \$X for 317 OPS”.
 - o The system informs you that you have more funds available to allocate.
-  **Note:** Targets are provided for each grant funding source. No Target indicated for State Funds.














Application 2012 User Guide for eGrATIS

- "No funding has been allocated to the [State Funds] Funding Source."
 - o eGrATIS supports entry of state funds to represent your entire budget.
 - o This amount will NOT be included in the amount requested as Grant Awards, nor will this amount be reflected in the Notice of Award received at the beginning of the grant year.
- "X% of your Funding has been distributed across all objectives".
 - o This occurs if *more than 25%* of your total budget is allocated across all eligible objectives. For example, you have 100 line items for \$1000 each. Twenty-five or more of the line items are associated to all possible line items which, in turn triggers this warning.

REPORTS:

Several standard reports are provided to assist with completion of the application or reporting to local officials. These reports display real-time information.

See Section XI Print/Save Application Reports for full descriptions on each report.

Reports				
Budget Justification				 PDF
Workplan Details				 PDF
Programmatic Budget	View Report	 Excel	 Word	
Budget Summary	View Report	 Excel	 Word	
Funding Source Component	View Report	 Excel	 Word	
Program Operations by Line Item	View Report	 Excel	 Word	
Workplan Data		 Excel		
SF424a				 PDF
IIS Registry Business Plan				 PDF

ATTACHMENTS:

The ability to submit attachments is enabled after you have completed your workplan and budget.

Your view will appear different depending on if you have federally and/or state recognized tribes.

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Grantees with federally and/or state recognized Tribes will see:

Attachments

Attachments can be uploaded after the workplan and budget are complete. If there are required attachments, those must be attached in order to submit.

Required

There are no required files attached.

Type	Name/Description
	Chapter 1, Tribes

Grantees with no federally and/or state recognized tribes will see:

Attachments

Attachments can be uploaded after the workplan and budget are complete. If there are required attachments, those must be attached in order to submit.

Optional Attachments

You have the option of attaching supporting documents (e.g., Budget Supporting Document, Workplan Supporting Document).

DATA COLLECTION TOOLS:

This is a new feature to eGrATIS. The system provides data entry forms that look similar to a questionnaire or survey form. You will be asked to select an answer and/or enter information. All questions must be answered to be considered completed.

The forms are:

- IIS Business Plan
- VFC and AFIX Site Visit Tables (*Not applicable if you do not receive VFC funds*)

Data Collection Tools

Data Collection Tool	Progress
VFC/AFIX Site Visit Table for Gotham City	0%
IIS Business Plan Data Entry for Gotham City	0%

Progress of 100% means all questions are answered. This percentage dynamically calculates.

Application 2012 User Guide for eGrATIS

SUBMISSION:

The ability to submit the application (mark finalized) will not be available until all budget, workplan, data collection tool, and attachment items are complete. See *Section XIII Submit Application* below for details.

Only those with Super User role may submit the application.

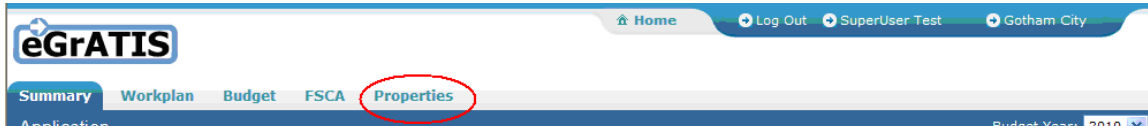
Finalize (Submit Application)

Submit

Application 2012 User Guide for eGrATIS

VI. Set Application Properties

Application Properties must be completed before starting on the Budget. You may also update the properties page any time prior to submission.



The Properties page documents the Default Rate/Amounts and Indirect Rates/Amount for the Grantee.

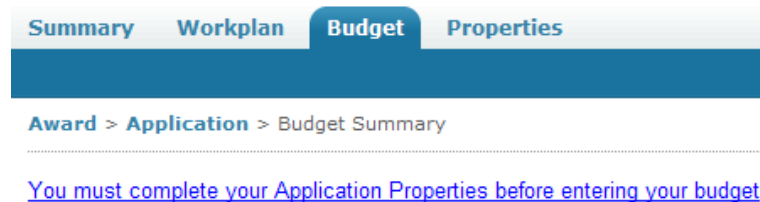
- The Default Rate/Amounts are pre-populated into the line item
 - o Default Fringe Rate and Fringe Amount apply to Personnel budget line items
 - o Default Per Diem Amount and Mileage apply to Travel
- The Indirect Cost Components section has been updated for Application 2012. By adding Indirect Cost Components, they system will generate Indirect line items per Budget Category/Funding Source based on the user defined criteria
 - i Important:** You may choose to NOT enter Indirect Cost Components and manually enter Indirect line items. If so, when you enter your Indirect line item into the budget, enter the Total Requested amount based on that rate. Grantees should ensure that they are entering at least as much funding on the Indirect line item as is required by approved Indirect rate.

Users with Super User, User Level 1, User Level 2, or User Level 3 role can update Properties.

A. Access Application Properties

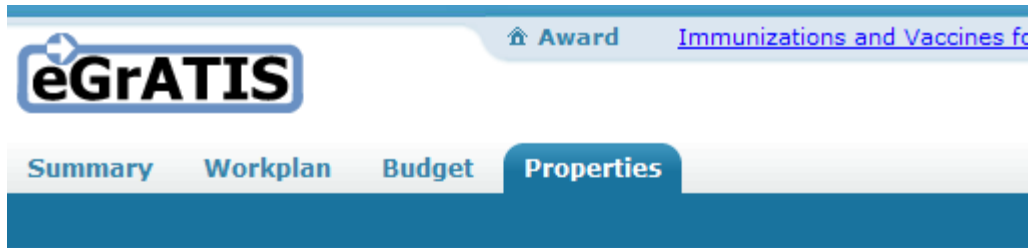
1. Select the Properties tab.

- i Note:** If you attempt to start on the Budget before updating the Properties Default Amounts/Rates, the system will display the following link. Selecting it will take you to the Properties page.



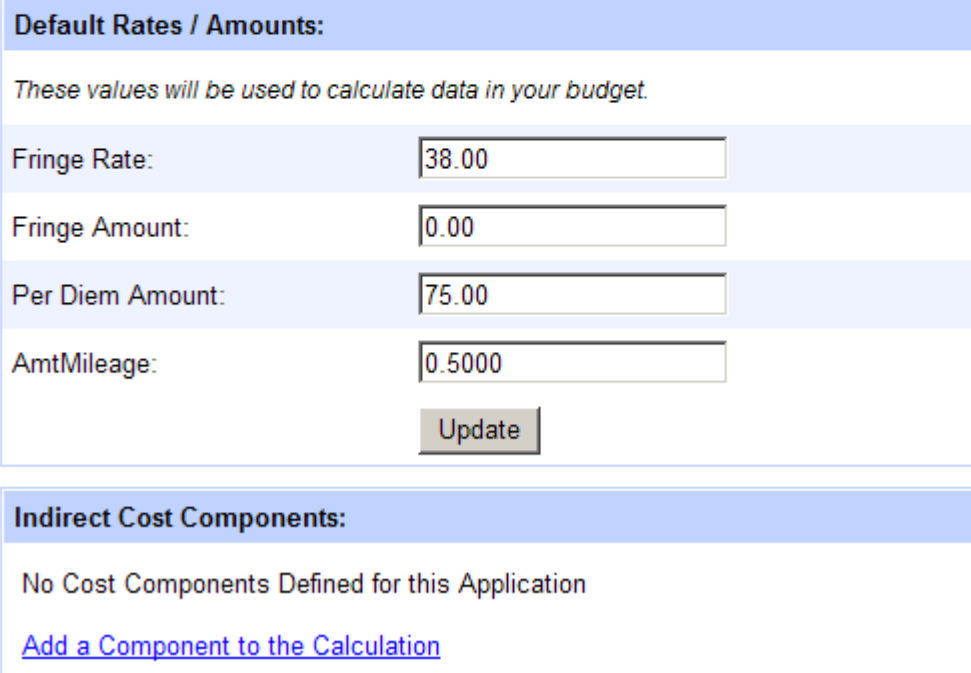
Application 2012 User Guide for eGrATIS

The system displays the Application Properties page. The Default Rates/Amounts values are pre-populated from the 2012 application.



The screenshot shows the eGrATIS application interface. At the top, there is a navigation bar with the eGrATIS logo and a link to 'Award Immunizations and Vaccines for'. Below this, there is a tabbed interface with four tabs: 'Summary', 'Workplan', 'Budget', and 'Properties'. The 'Properties' tab is currently selected and highlighted in blue.

Application Properties



The screenshot shows the 'Application Properties' form. It has a section titled 'Default Rates / Amounts:' with a subtitle 'These values will be used to calculate data in your budget.' Below this, there are four input fields: 'Fringe Rate:' with a value of 38.00, 'Fringe Amount:' with a value of 0.00, 'Per Diem Amount:' with a value of 75.00, and 'AmtMileage:' with a value of 0.5000. There is an 'Update' button at the bottom of this section. Below the 'Default Rates / Amounts:' section, there is another section titled 'Indirect Cost Components:' with the text 'No Cost Components Defined for this Application' and a link 'Add a Component to the Calculation'.

B. Update Default Rates and Amounts

2. If applicable, edit the default rates and amounts information.

If you change the current **Default Fringe Rate**, **Default Fringe Amount**, or **Default Per Diem Amount**, you must determine one of the following options as shown in the following example where the Per Diem amount was changed from an old value of \$28.00 to the new value of \$32.00:

Application 2012 User Guide for eGrATIS

Application Properties

Default Rates / Amounts:	
<i>These values will be used to calculate data in your budget.</i>	
Fringe Rate:	<input type="text" value="37.90"/>
Fringe Amount:	<input type="text" value="17200.00"/>
Per Diem Amount:	<input type="text" value="32.00"/> <input type="button" value="Do not change the value for any of my existing line items"/>
AmtMileage:	<input type="text" value="0.5000"/>
<input type="button" value="Update"/>	

Three options are provided **in case these Properties are adjusted after budget allocations are already entered**. You may choose for the system to:

- Not update the value for existing allocations.
- Update existing allocations which use the default value, but do not update allocations where you had overwritten the default value. For example, if you had already entered allocations and overwritten the default, this option would maintain those manually overwritten Per Diem amounts.
- Update all existing allocations to the new value, regardless of the current value used.

i Newly Added Allocation: In each case, all *newly added allocations* (e.g., via *Add New Line Item* button) will use the new default value.

i Allocations Copied from Prior Year: Any line items copied in from last year will continue to have last year's rates. You may copy them in and update manually or copy then all in and update the rates from the Properties page.

3. Once all answers are accurate, click the "Update" button.

C. Manage Indirect Cost Components – New!

System generated Indirect line items based on user defined Indirect Cost Components on the Properties page is new for Application 2012. The system still provides the ability to manually enter Indirect allocations per Budget Category/Funding Source if you choose to do this instead.

If you choose to have the system generate Indirect line items, you may enter then at any time; however, it is best to enter your Indirect Cost Components **before** entering the budget. Then your Indirect amounts will be calculated as you build your budget. If you need to adjust the Indirect Cost Components later, you may do so and the system will re-calculate the Indirect line items based on your Indirect Cost Component entries.

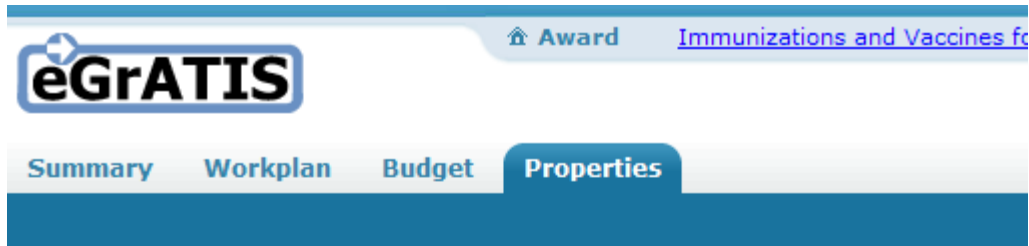
i Important: Once a cost component is created, any Indirect line items manually entered will be overwritten because the system is enforcing the rule defined. For

Application 2012 User Guide for eGrATIS

example, if you include a cost component of 21% of salaries only, the Indirect will force calculation per funding source based on this rule.

The system gives you the ability to:

- Add a Basic Cost Component
- Add Multiple Cost Components
- Add Cost Components with Options
- Delete Cost Components



The screenshot shows the eGrATIS application interface. At the top, there is a navigation bar with the eGrATIS logo and a link to 'Award Immunizations and Vaccines for'. Below this, there is a tabbed interface with four tabs: 'Summary', 'Workplan', 'Budget', and 'Properties'. The 'Properties' tab is currently selected and highlighted in blue.

Application Properties

Default Rates / Amounts:

These values will be used to calculate data in your budget.

Fringe Rate:	<input type="text" value="38.00"/>
Fringe Amount:	<input type="text" value="0.00"/>
Per Diem Amount:	<input type="text" value="75.00"/>
AmtMileage:	<input type="text" value="0.5000"/>
<input type="button" value="Update"/>	

Indirect Cost Components:

No Cost Components Defined for this Application

[Add a Component to the Calculation](#)

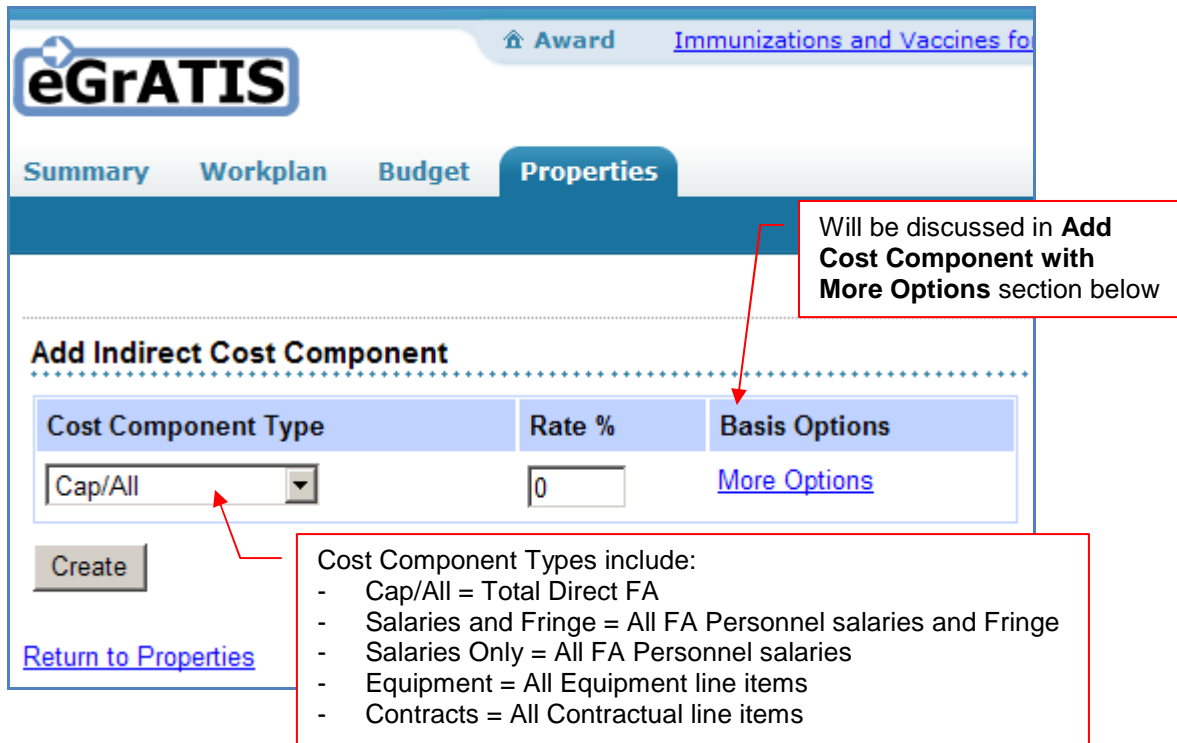
Ability to create multiple indirect cost components

Add a Basic Cost Component

1. Select the [Add a Component to the Calculation](#) link.

Application 2012 User Guide for eGrATIS

The system displays the Add Indirect Cost Component page.



Add Indirect Cost Component

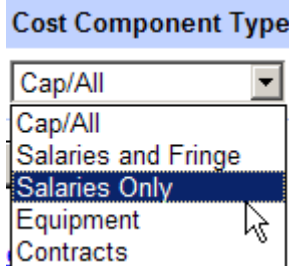
Cost Component Type	Rate %	Basis Options
Cap/All	0	More Options

[Return to Properties](#)

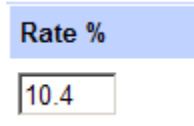
Cost Component Types include:

- Cap/All = Total Direct FA
- Salaries and Fringe = All FA Personnel salaries and Fringe
- Salaries Only = All FA Personnel salaries
- Equipment = All Equipment line items
- Contracts = All Contractual line items

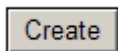
2. Select a Cost Component Type



3. Enter a Rate % (e.g., entered 10.4 for 10.4 %)



4. Select the Create button.



Application 2012 User Guide for eGrATIS

The system will return to the Properties page listing the cost component created.

Indirect Cost Components:		
Rate	Basis for Calculation	Actions
10.40%	of Salaries Only line items	Delete
Add a Component to the Calculation		

At this point the system is set to generate Indirect for FA Personnel line items based on salaries only.

You may add additional cost components by selecting the [Add a Component to the Calculation](#) link.

Add a Multiple Cost Component

After adding a cost component, you may select the [Add a Component to the Calculation](#) link again.

You may want to create two components. For example, 10.40% of Salaries and Fringe and 16% of Contracts:

Indirect Cost Components:		
Rate	Basis for Calculation	Actions
10.40%	of Salaries and Fringe line items	Delete
16.00%	of Contracts line items	Delete
Add a Component to the Calculation		

Add a Cost Component with Options

1. Select the [Add a Component to the Calculation](#) link.
2. Select the Cost Component Type
3. Enter the Rate %

Application 2012 User Guide for eGrATIS

4. Select the [More Options](#) link.

Add Indirect Cost Component

Cost Component Type	Rate %	Basis Options
Cap/All	20	More Options

The system will display:

Cost Component Type	Rate %	Basis Options
Cap/All	20	Based on the Full \$ Amount for All Line Items
No Options		

You will see that the default is to calculate the indirect values based on the Full \$ Amount of All the Line Items.

Using the two Basis Options drop downs, three additional options may be created.

1. Based on the Partial \$ Amount for All Line Items.
2. Based on the Full \$ Amount for Some Line Items.
3. Based on the Partial \$ Amount for Some Line Items.

Option 1: Based on the Partial \$ Amount for All Line Items

1. Set amount to "Partial \$ Amount".

The system will display

Cost Component Type	Rate %	Basis Options
Cap/All	0	Based on the Partial \$ Amount for All Line Items
<p>• (Based on the first \$0 of the line item.)</p>		
<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 1px solid red; padding: 5px;">Select to clear the options</div> <div style="text-align: center;"> No Options </div> <div style="border: 1px solid red; padding: 5px;">Max of line item to be included in calculation</div> </div>		

Application 2012 User Guide for eGrATIS

- Enter the maximum amount of the line item to be included in the Indirect calculation.

Cost Component Type	Rate %	Basis Options
Cap/All	20	Based on the Partial \$ Amount for All Line Items
<ul style="list-style-type: none"> (Based on the first \$40000 of the line item.) 		
No Options		

Max of line item to be included in calculation

- Select the Create button.

Create

The Indirect Cost Component is created.

Indirect Cost Components:		
Rate	Basis for Calculation	Actions
20.00%	of Cap/All line items up to the first \$40,000	Delete
Add a Component to the Calculation		

Option 2: Based on the Full \$ Amount for Some Line Items

- Set the amount to "Full \$ Amount".
- Set the line items to "Some Line Items".

Add Indirect Cost Component

Cost Component Type	Rate %	Basis Options
Cap/All	20	Based on the Full \$ Amount for Some Line Items
<ul style="list-style-type: none"> (Based on Line Items between \$0 and \$0) 		
No Options		

Application 2012 User Guide for eGrATIS

- Enter the dollar range. The system will calculate indirect for line items falling within this range.

Cost Component Type	Rate %	Basis Options
Cap/All	20	Based on the Full \$ Amount for Some Line Items
<ul style="list-style-type: none"> (Based on Line Items between \$50000 and \$200000) 		
No Options		

- Select the Create button.

Create

The Indirect Cost Component is created.

Indirect Cost Components:		
Rate	Basis for Calculation	Actions
20.00%	of Cap/All line items that have an amount between \$50000 and \$200000	Delete
Add a Component to the Calculation		

Option 3: Based on the Partial \$ Amount for Some Line Items

- Set the amount to "Partial \$ Amount".
- Set the line items to "Some Line Items".

Cost Component Type	Rate %	Basis Options
Cap/All	20	Based on the Partial \$ Amount for Some Line Items
<ul style="list-style-type: none"> (Based on Line Items between \$0 and \$0) (Based on the first \$0 of the line item.) 		
No Options		

- Enter the dollar range. The system will calculate indirect for line items falling within this range.

Application 2012 User Guide for eGrATIS

- Enter the max amount per line item.

Add Indirect Cost Component

Cost Component Type	Rate %	Basis Options
Cap/All	20	Based on the Partial \$ Amount for Some Line Items
<ul style="list-style-type: none"> (Based on Line Items between \$100000 and \$200000) (Based on the first \$80000 of the line item.) 		
No Options		

Create

- Select the Create button.

The Indirect Cost Component is created.

Indirect Cost Components:		
Rate	Basis for Calculation	Actions
20.00%	of Cap/All line items that have an amount between \$100000 and \$200000 up to the first \$80,000	Delete
Add a Component to the Calculation		

Delete a Cost Component

- i** If there are **multiple cost components and a subset is deleted**, the system will adjust the Indirect line items using the remaining cost component(s).
- w** If you **delete ALL** cost components, the Indirect line items that were created by the system are NOT deleted. If you are not going to use the cost component, you **MUST** go to the system generated Indirect line item and manually delete it. You may then manually enter Indirect.

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On the Properties page, each cost component has a delete link.

Select the delete link of the cost component you wish to delete.

Indirect Cost Components:		
Rate	Basis for Calculation	Actions
10.40%	of Salaries Only line items	Delete
Add a Component to the Calculation		

The system will provide feedback.

Indirect Cost Components:		
Deleted Cap/All Component of Indirect Cost. Budget Updated.		
Rate	Basis for Calculation	Actions
Add a Component to the Calculation		

Application 2012 User Guide for eGrATIS

VII. Create Application Work Plan

The following tasks are covered in this section:

- Access Work Plan Summary – Edit Mode
- Complete Required Objectives
- Mark Required Objectives as “Does not Apply”
- Add Optional Objectives
- Edit Optional Objectives
- Delete Optional Objectives
- Filter Objectives List
- Funding Breakout

In 2012, the IPOM has been re-structured such that there are designated Required Objectives. These objectives are pre-loaded into eGrATIS. You must indicate the Performance Measure(s) and the Activities for each objective.

In very special circumstances, the Required Objective may not be applicable to you. You may indicate this and **must** provide appropriate justification. *Please contact your Project Officer if you have any questions.*

In addition to the Required Objectives, you may add Optional Objectives. These objectives are not required by the IPOM but are part of your workplan and items for which you will request funding (by association to line items in the budget).

Note: There are no Required Objectives listed for Chapter 7 (Adult Immunizations) or Chapter 11 (WIC). In this case, Optional objectives for these chapters may be added to your workplan.

Note: 317 FA Vaccine funds may not fund any of the Required Objectives. If you will be requesting 317 FA funds to purchase vaccine, you must create an Optional Objective(s) to associate to the Vaccine line item(s). (See IPOM Chapter 0 – The Basics for more information on Allowable Expenses with Categorical Funding.)

The following changes made to your Workplan may required adjustments to the budget if budget line items are associated to objectives **before** the workplan is completed.

Therefore, it is encouraged that you plan out and add your Optional Objectives or mark Required Objectives as “does not apply” early in the process.

- If an Optional Objective is deleted after associated to a line item, this association is removed causing need for adjustment to the line item.
- If an Optional Objective is added, it is not yet funded so it must then be associated to the appropriate line items.
- If a Required Objective is marked as not applicable after associated to a line item, this association is removed causing need for adjustment to the line item.

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All Objectives must be approved prior to submission of the application, indicating they are complete. *Only a person with Super User role may approve objectives.*

Workplan: Pre-loaded IPOM Required Objectives

The IPOM is structured such that there are designated Required Objectives. These objectives are pre-loaded into eGrATIS.

Note: Some grantees may have additional “required” objectives. For example, if you are an IIS Sentinel Site, you have a set of required objectives for this project.

In very special circumstances, the Required Objective may not be applicable to you. If a Required Objective is not applicable to you, you may indicate this and **must** provide adequate justification in the space provided. *Please see Section C of this section for more information or contact your Project Officer if you have questions.*

In addition to the Required Objectives, you may add objectives, which will be termed Optional Objectives in this guide. These objectives are not required by the IPOM but are part of your workplan and items for which you will request funding (by association to line items in the budget).

Note: There are no “required” objectives for IPOM Chapter 7 – Adult Immunization and Chapter 11 – WIC. You will need to create your objectives for these chapters.

Note: None of the “required” objectives can be funded by 317 FA Vaccine funds. So if you are a grantee that has 317 FA Vaccine funds, you will need to create the appropriate objective. *(IPOM Chapter 0 – The Basics includes a table on Allowable Expenses with Categorical Funding.)*

Workplan: Types of Performance Measures

One or more Performance Measures are required for each objective. There are four types:

- **Statement:** The system may provide a statement of some action you must complete in eGrATIS (e.g., attach a document, complete a Data Collection Tool) or request you to enter information.
- **Question:** A question with yes/no response options.
- **QuestionWithDNV:** A question with yes/no/data not reviewed response options.
- **Target:** Provide a percent or number of expected completion by the end of the budget year.

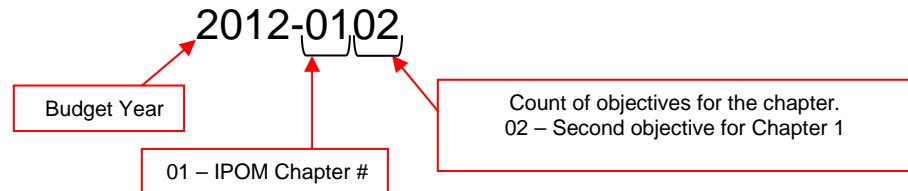
Note: To see more details about a performance measure associated to a required objective, view the IPOM.

If you write optional objectives, you will also create your own performance measures for those optional objectives.

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Workplan: Objective Numbering by Chapter

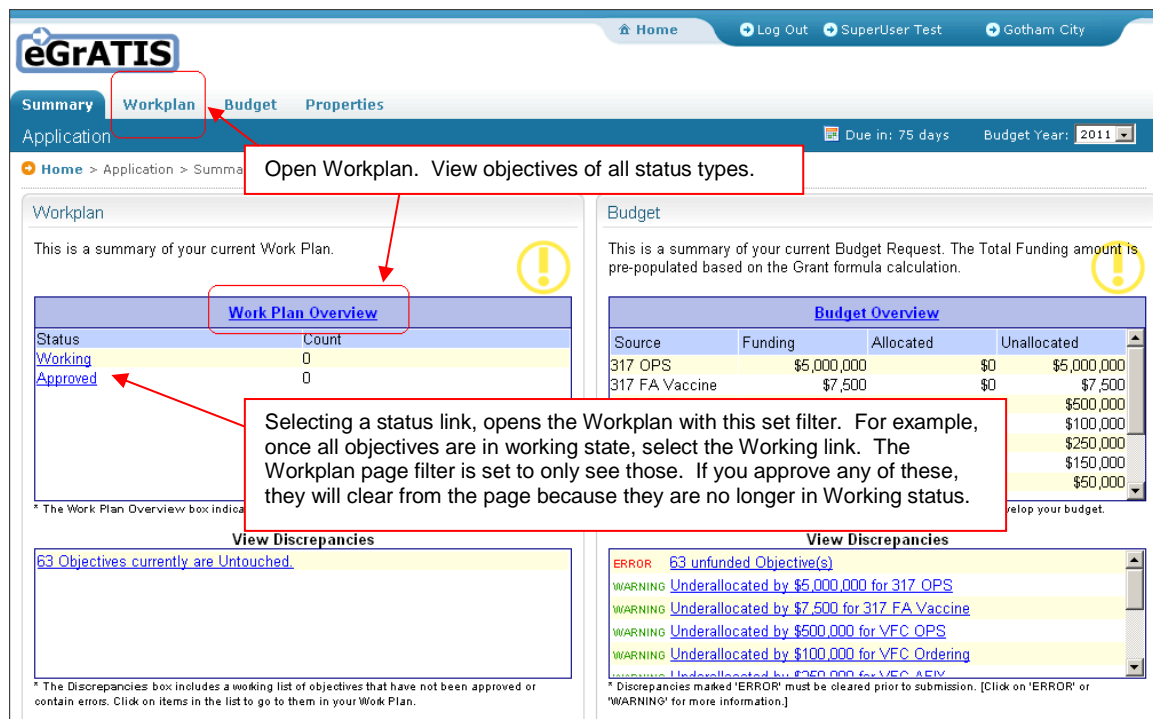
With the inclusion of the pre-loaded Required Objectives from the IPOM, the objectives are grouped by Chapter. For example, Chapter 1 of the IPOM has two Required Objectives. They are numbered 2012-0101 and 2012-0102.



Note: The IPOM has 12 chapters. Pan Flu is Chapter 13. Some may have additional objectives: Enhanced Perinatal Hepatitis B is Chapter 14; IIS Sentinel Sites is Chapter 15.

A. Access Work Plan – Edit Mode

You may access the Workplan from the navigation link or by selecting the Workplan section link [Work Plan Overview](#) on the **Application > Summary** page.



Open Workplan. View objectives of all status types.

Work Plan Overview

Status	Count
Working	0
Approved	0

Budget Overview

Source	Funding	Allocated	Unallocated
317 OPS	\$5,000,000	\$0	\$5,000,000
317 FA Vaccine	\$7,500	\$0	\$7,500
			\$500,000
			\$100,000
			\$250,000
			\$150,000
			\$50,000

Selecting a status link, opens the Workplan with this set filter. For example, once all objectives are in working state, select the Working link. The Workplan page filter is set to only see those. If you approve any of these, they will clear from the page because they are no longer in Working status.

View Discrepancies

63 Objectives currently are Untouched.

View Discrepancies

ERROR 63 unfunded Objective(s)

WARNING Underallocated by \$5,000,000 for 317 OPS

WARNING Underallocated by \$7,500 for 317 FA Vaccine

WARNING Underallocated by \$500,000 for VFC OPS

WARNING Underallocated by \$100,000 for VFC Ordering

WARNING Underallocated by \$250,000 for VFC ASIV

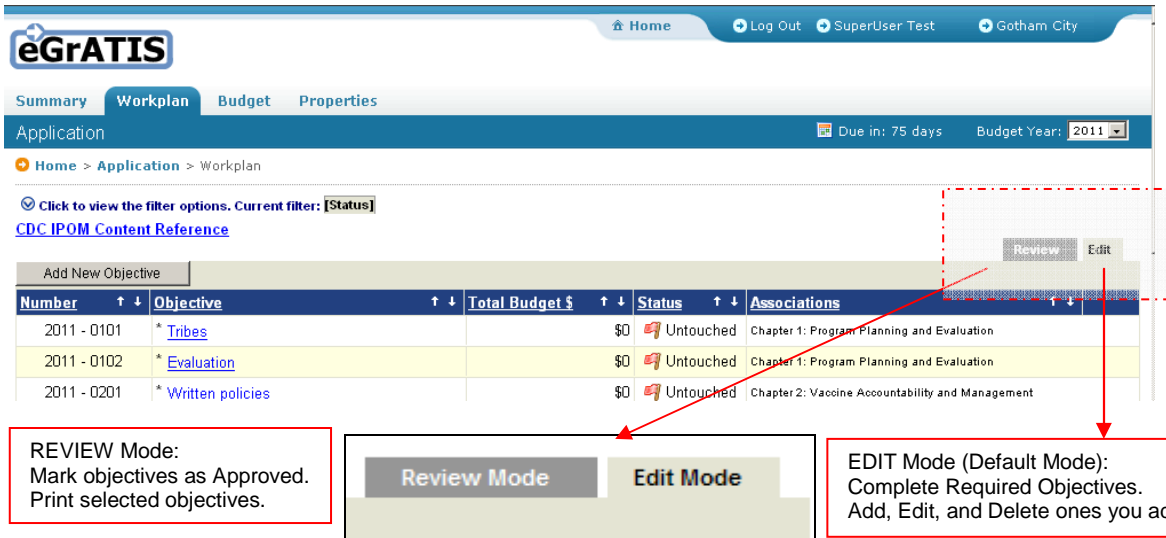
WARNING Underallocated by \$150,000 for VFC ASIV

WARNING Underallocated by \$50,000 for VFC ASIV

* The Discrepancies box includes a working list of objectives that have not been approved or contain errors. Click on items in the list to go to them in your Work Plan.

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The system will display the **Application > Workplan** page defaulted in Edit Mode. Required objectives are pre-loaded.



eGrATIS Home Log Out SuperUser Test Gotham City

Summary **Workplan** Budget Properties

Application Due in: 75 days Budget Year: 2011

Home > Application > Workplan

Click to view the filter options. Current filter: [Status]

[CDC IPOM Content Reference](#)

Add New Objective

Number	Objective	Total Budget \$	Status	Associations
2011 - 0101	* Tribes	\$0	Untouched	Chapter 1: Program Planning and Evaluation
2011 - 0102	* Evaluation	\$0	Untouched	Chapter 1: Program Planning and Evaluation
2011 - 0201	* Written policies	\$0	Untouched	Chapter 2: Vaccine Accountability and Management

REVIEW Mode:
Mark objectives as Approved.
Print selected objectives.

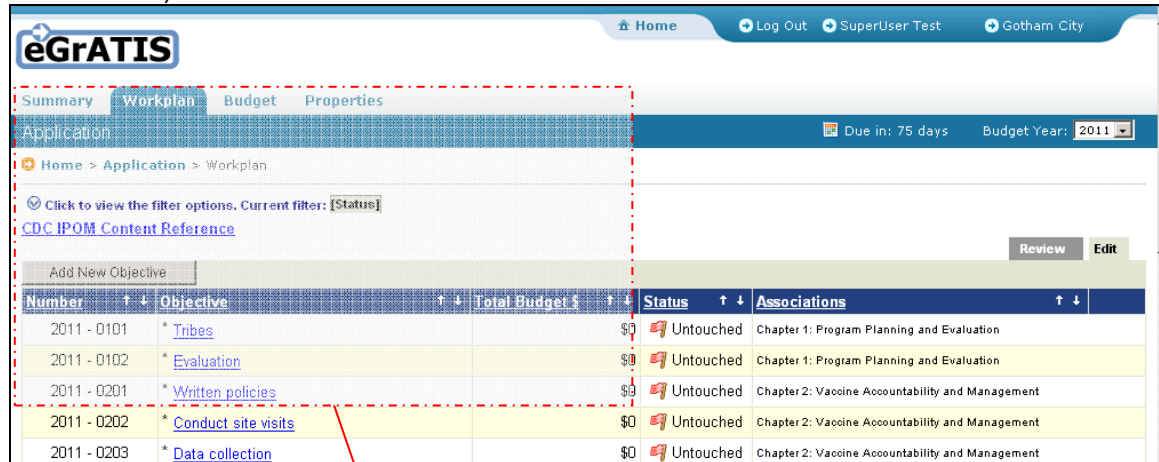
Review Mode **Edit Mode**

EDIT Mode (Default Mode):
Complete Required Objectives.
Add, Edit, and Delete ones you added.

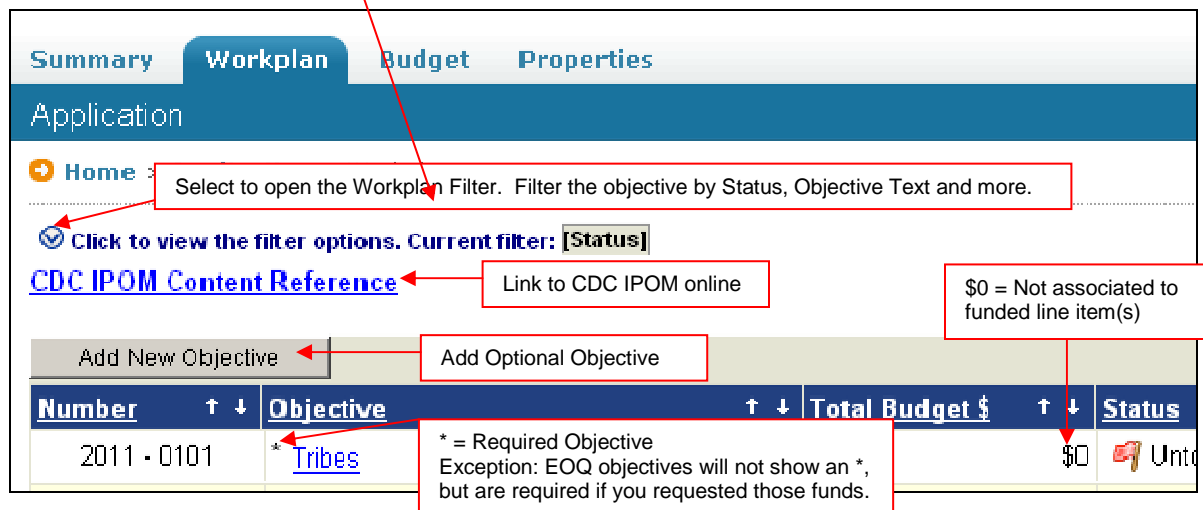
Application 2012 User Guide for eGrATIS

B. Complete Required Objectives

When first opening the Workplan, you will see a list of required objectives (as indicated in the IPOM).



Number	Objective	Total Budget	Status	Associations
2011 - 0101	* Tribes	\$0	Untouched	Chapter 1: Program Planning and Evaluation
2011 - 0102	* Evaluation	\$0	Untouched	Chapter 1: Program Planning and Evaluation
2011 - 0201	* Written policies	\$0	Untouched	Chapter 2: Vaccine Accountability and Management
2011 - 0202	* Conduct site visits	\$0	Untouched	Chapter 2: Vaccine Accountability and Management
2011 - 0203	* Data collection	\$0	Untouched	Chapter 2: Vaccine Accountability and Management



Number	Objective	Total Budget	Status
2011 - 0101	* Tribes	\$0	Untouched

* = Required Objective
Exception: EOQ objectives will not show an *, but are required if you requested those funds.

\$0 = Not associated to funded line item(s)

1. Click the Objective name link (to the right of the Objective Number) to expand the Objective details.
2. First determine if this objective is applicable to you. If it is not go to *Section C. Mark Required Objective as Not Applicable* below and provide justification as required. Otherwise, continue to next step.
3. If this objective is related to IIS (e.g., you will use an IIS to complete the task), check the "IIS Related Objective" checkbox.

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2011 - 0102 * [Evaluation](#) \$0 Chapter 1: Program Planning and Evaluation

Objective **Performance Measure** **Grantee Activities**

Objective Name: * Evaluation This Objective does not Apply: ☐

Association: Chapter 1: Program Planning and Evaluation

Type: Required

Statement: * All grantees are required to develop and submit an evaluation plan for a component of their program to CDC.

IIS Related Objective: ☐ Indicate if the objective is related to Immunization Information Systems. Checking this will make it part of you IIS Business Plan.

4. Select the Performance Measure tab

Objective **Performance Measure** **Grantee Activities**

Number	Type	Performance Measure
1	Question	Development of an evaluation plan.
2	Statement	<List the program components you are evaluating.>

Performance Measure

5. Select each Performance Measure listed and provide an answer.

There are three types of Performance Measures: Statement, Question, and Target. The Evaluation objective includes a Question and Statement.

a. Select the Question link. The question is listed at the bottom of the tab.

Objective **Performance Measure** **Grantee Activities**

Number	Type	Performance Measure
1	Question	Development of an evaluation plan. Yes
2	Statement	<List the program components you are evaluating.>

Performance Measure 1
Development of an evaluation plan.

No ☐ Yes ☒

After selecting the answer to the Question, it is populated in the table above.

b. Select the Statement link. The statement is listed at the bottom of the tab.

Objective **Performance Measure** **Grantee Activities**

Number	Type	Performance Measure
1	Question	Development of an evaluation plan. Yes
2	Statement	<List the program components you are evaluating.>

Performance Measure 2
<List the program components you are evaluating.>

The statement

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Click on the text and replace it with your answer.

2011 - 0102 * [Evaluation](#) Working Chapter 1: Program Planning and Evaluation

Objective Performance Measure Grantee Activities

Number	Type	Performance Measure
1	Question	Development of an evaluation plan. Yes
2	Statement	Adolescent Vaccination, Adult Vaccination, Education/Training, IIS, Population Assessment

Performance Measure 2

Adolescent Vaccination, Adult Vaccination, Education/Training, IIS, Population Assessment

Enter an answer.
The answer is populated in the table above.

The Evaluation objective does not have a Target measure; however, the Provider Participation objective has three targets.

2011 - 0303 * [Provider participation](#) \$0 Untouched Chapter 3: Immunization Information Systems

Objective Performance Measure Grantee Activities

Number	Type	Performance Measure
1	Target	Percentage of public provider sites that routinely submit immunization events to the IIS on child
2	Target	Number of private provider sites submitting immunization events to the IIS on children under 6 y
3	Target	Percentage of private provider sites submitting immunization events to the IIS on children under

Performance Measure 1

Percentage of public provider sites that routinely submit immunization events to the IIS on children under 6 years of age.

Select a Performance Measure link.
Enter value below.

<Enter value here> %

6. Select the Grantee Activities tab and enter the activities necessary to meet this objective.

2011 - 0102 * [Evaluation](#) Working Chapter 1: Program Planning and Evaluation

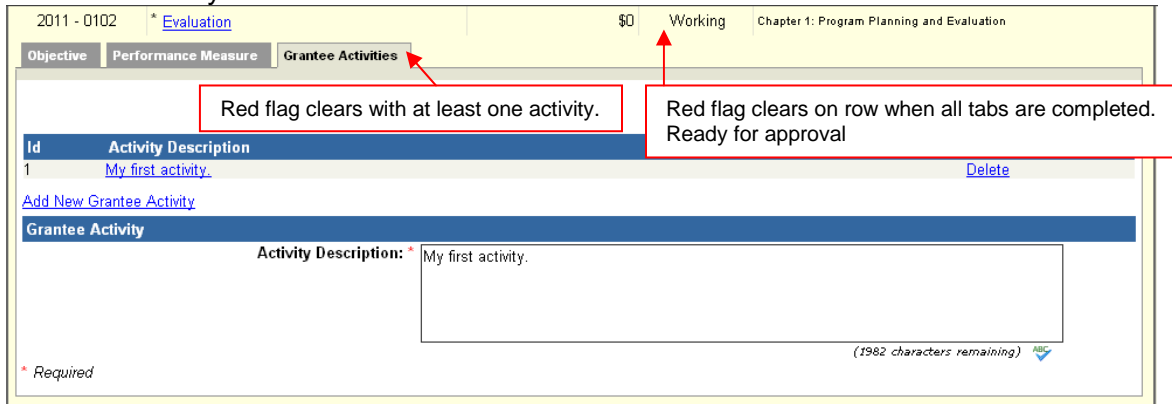
Objective Performance Measure **Grantee Activities**

Id	Activity Description	Timeline
Add New Grantee Activity		

* Required

Application 2012 User Guide for eGrATIS

7. Enter activity information.



2011 - 0102 * [Evaluation](#) \$0 Working Chapter 1: Program Planning and Evaluation

Objective Performance Measure **Grantee Activities**

Red flag clears with at least one activity.


Red flag clears on row when all tabs are completed. Ready for approval

Id	Activity Description
1	My first activity. Delete

[Add New Grantee Activity](#)

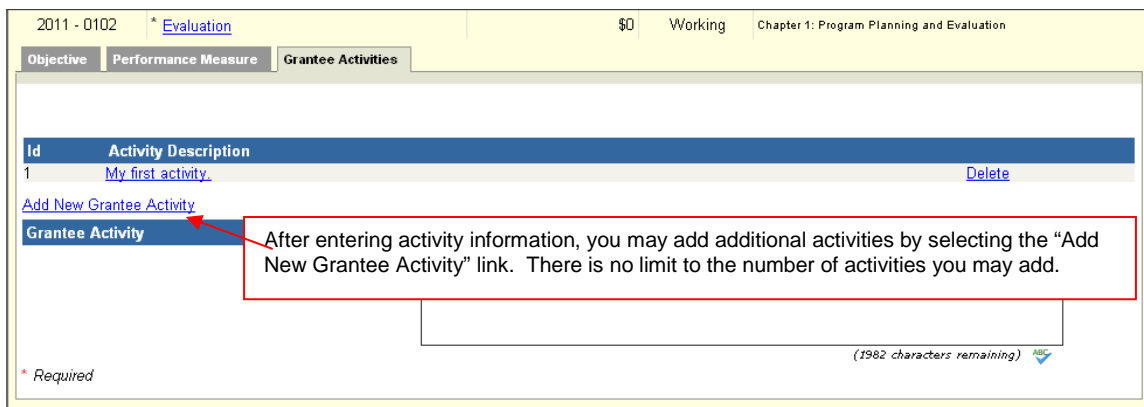
Grantee Activity

Activity Description: * My first activity.

(1982 characters remaining) 

* Required

You may enter more activities.



2011 - 0102 * [Evaluation](#) \$0 Working Chapter 1: Program Planning and Evaluation


Objective Performance Measure **Grantee Activities**

Id	Activity Description
1	My first activity. Delete

[Add New Grantee Activity](#)

Grantee Activity

After entering activity information, you may add additional activities by selecting the “Add New Grantee Activity” link. There is no limit to the number of activities you may add.

(1982 characters remaining) 

* Required

C. Mark Required Objectives as “Does not Apply”

When first opening the Workplan, you will see a list of required objectives (as indicated in the IPOM).

1. Click the Objective name link (to the right of the Objective Number) to expand the Objective details.

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2011 - 0101 * Tribes \$0 Untouched Chapter 1: Program Planning and Evaluation

Objective Performance Measure Grantee Activities

Objective Name: * Tribes

Association: Chapter 1: Program Planning and Evaluation

Type: Required

Statement: * As part of the grant application and progress reports, grantees must submit documentation that describes how tribes are involved in the planning and implementation of immunization program activities for AI/AN populations

IIS Related Objective: ☐

This Objective does not Apply: ☐

2. Select the “This Objective does not Apply” check box.

Note: Because the objective “Does not Apply” you will not be able to associate any line items to it or budget funds towards it. Therefore, the system does not allow association to it in the Budget.

Application Due in: 74 days Budget Year: 2011

Home > Application > Budget Summary > Line Item Details

go to: 317 OPS Personnel Budget Summary < Previous | Next (FA : Travel) >

Total Allocated: \$0
Target: \$5,000,000
Remaining: \$5,000,000

Add an existing Personnel line item to the 317 OPS budget, type here to search.

Add New Line Item Show All Filter

Type	Name (Job Title)	Total
Pete Washington (Data Systems Ad		

Details Objectives Change Log

Search View all

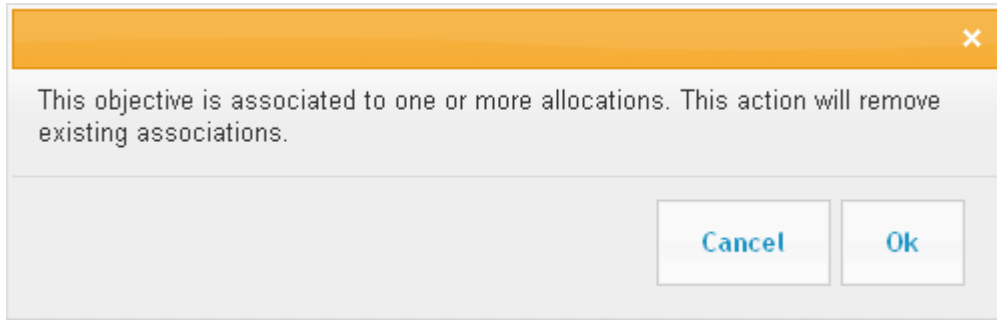
ID	Name	Objective %	Total \$	Splits
20110101	Tribes (\$0)	0.0	\$0	
20110102	Evaluation (\$0)	0.0	\$0	
20110103	My first added objective (\$0)	0.0	\$0	
20110201	Written policies (\$0)	0.0	\$0	

Since Tribes is marked as “Does not Apply”, this objective cannot be associated to any line item. The entry field is disabled.

This will occur for each funding source the objective may be funded by. See IPOM Chapter 0 – The Basics for more information on Allowable Expenses with Categorical Funding.

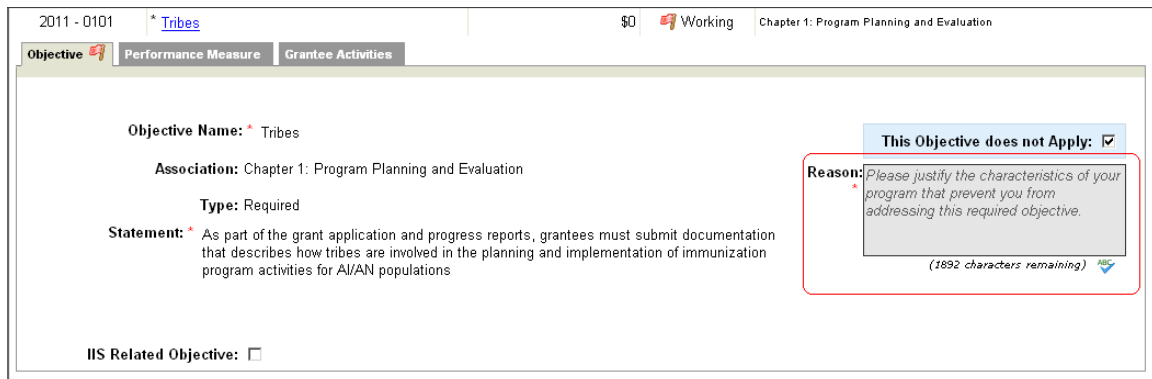
Note: If however there is already an association to the budget line item, the system will break this association. A warning is provided. If you select OK, you will have to adjust Objective associations for effected line items.

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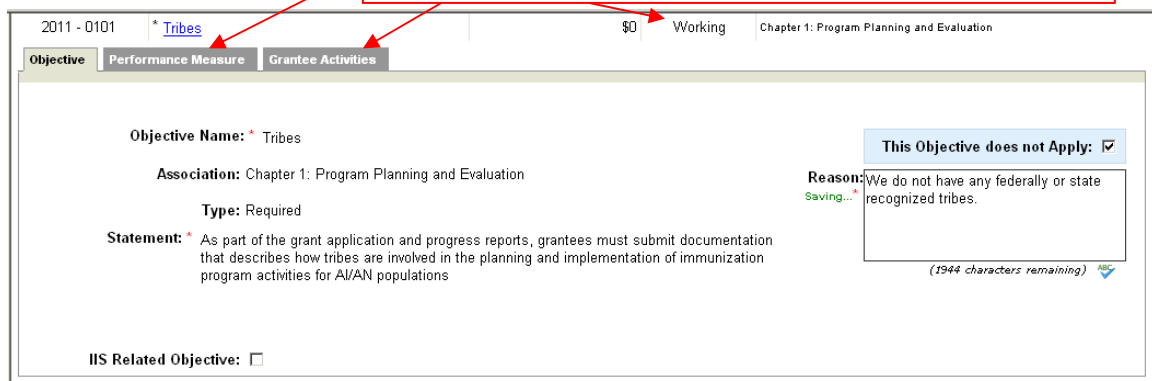


3. You **must** enter a valid reason to justify the characteristics of your program that prevent you from addressing this required objective.

If you have any questions about an appropriate justification, please contact your Project Officer.



Red flags clear on Performance Measure and Grantee Activities tab because they are not required if the objective does not apply. If data was entered there before marking does not apply, manually clear the information if it is not relevant.



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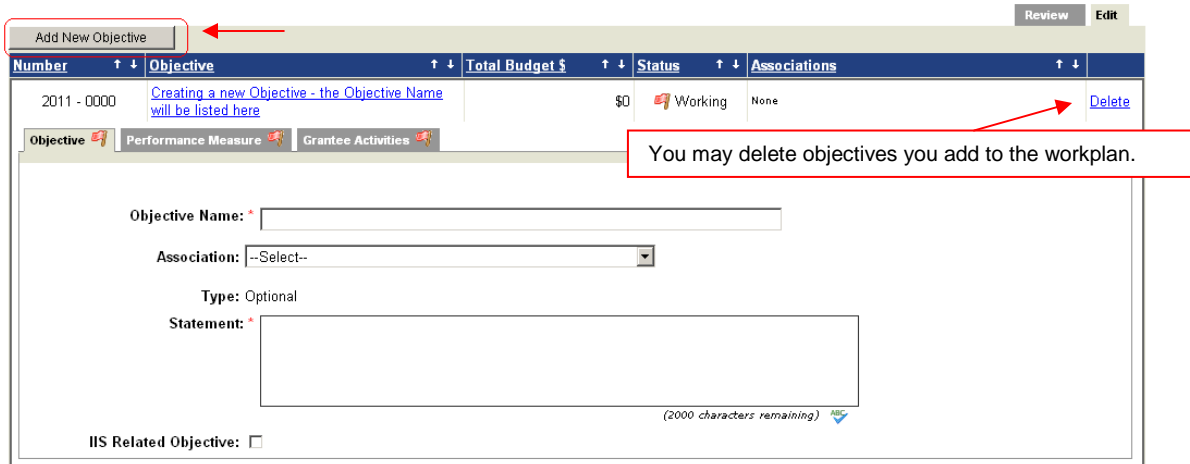
D. Add Optional Objective

1. Click the 'Add New Objective' button.

The new objective is given a default number of 2012-0000.

The system displays a blank 'Objective' which includes the following tabs:

- a. Objective
- b. Progress Measure
- c. Grantee Activities



Review Edit

Add New Objective

Number	Objective	Total Budget \$	Status	Associations
2011 - 0000	Creating a new Objective - the Objective Name will be listed here	\$0	Working	None

Objective Performance Measure Grantee Activities

Objective Name: *

Association: --Select--


Type: Optional

Statement: *

(2000 characters remaining)

IIS Related Objective: ☐


You may delete objectives you add to the workplan.


- **Tip:** The red flag  at the tab level indicates that data is missing from the tab. If any data is missing, the Objective status will be "Working" and marked with a flag. The Objective cannot be approved until all information is entered.

2. Enter the elements of the Objective.

a. Objective Name: A brief phrase to describe the objective.

b. Association: To which IPOM component is the objective related?

 **NOTE:** Optional objectives may apply to Chapters 1-11 of the IPOM.

 The system updates the objective number to correspond with the selected chapter, numbering it with the next available number. For example, Chapter 1 has two required objectives. If another objective is added for this Chapter, it is numbered 2012-0103. The third objective for chapter 1.

Application 2012 User Guide for eGrATIS

Add New Objective

Number	Objective	Total Budget \$	Status	Associations
2011 - 0101	* Tribes	\$0	Working	Chapter 1: Program Planning and Evaluation
2011 - 0102	* Evaluation			
2011 - 0103	* My first added objective			

After selecting the Chapter, the objective is assigned a number. The system updates the objective number to correspond with the selected chapter, numbering it with the next available number. For example, Chapter 1 has two required objectives. If another objective is added for this Chapter, it is numbered 2012-0103, the third objective for chapter 1.

Objective Name: * My first added objective

Association: Chapter 1: Program Planning and Evaluation

Type: Optional

Statement: *

(2000 characters remaining)

IIS Related Objective: ☐

c. Statement: The full objective description.

2011 - 0103 My first added objective \$0 Working Chapter 1: Program Planning and Evaluation [Delete](#)

Objective Performance Measure Grantee Activities

Objective Name: * My first added objective

Association: Chapter 1: Program Planning and Evaluation

Type: Optional

Statement: * The full objective statement is entered here.

(1955 characters remaining)

IIS Related Objective: ☐

d. Indicate if the objective is related to Immunization Information Systems. The objective will be marked as included in your IIS Business Plan.

2011 - 0103 My first added objective \$0 Working Chapter 1: Program Planning and Evaluation [Delete](#)

Objective Performance Measure Grantee Activities

Objective Name: * My first added objective

Association: Chapter 1: Program Planning and Evaluation



Type: Optional

Statement: * The full objective statement is entered here.

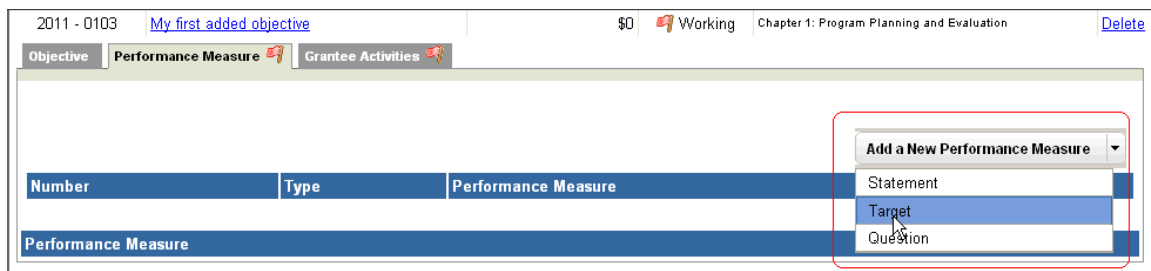
IIS Related Objective: ☐

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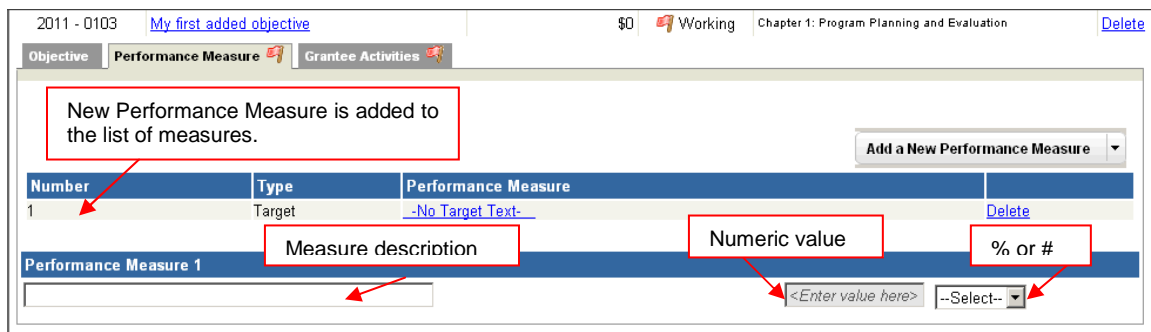
3. Select the Performance Measure tab.

-  Enter as many performance measures as needed.
-  You must enter *at least one*.
 - a. Select the Add a New Performance Measure button. A menu of three options is presented: Statement, Target, and Question.
 - b. Choose the type of Performance Measure this objective will have. (The objective may have more than one measure.)

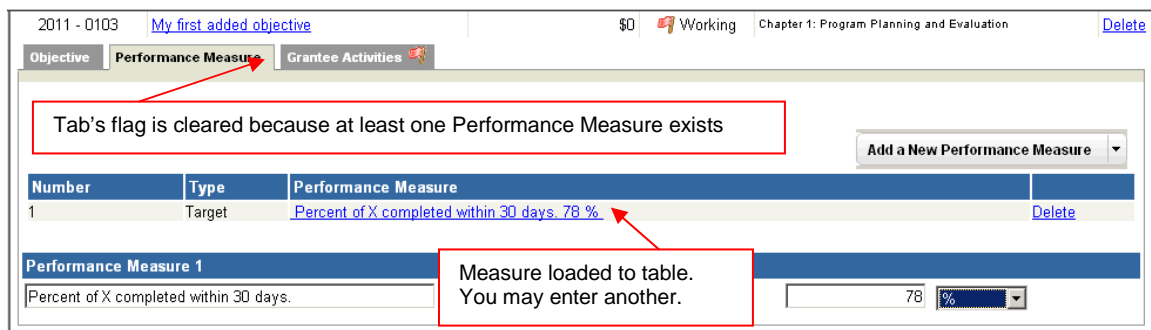
Target Performance Measure:



After selecting the type of Performance Measure, the system saves this measure to the list and provides data entry fields for you to create the measure details.



- c. Enter the Performance Measure's details. For example, by the end of the budget year 78% of X will be completed within 30 days.



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Statement Performance Measure:

2011 - 0103 [My first added objective](#) \$0 Working Chapter 1: Program Planning and Evaluation [Delete](#)

Objective Performance Measure Grantee Activities

Statement describing the Performance measure.

[Add a New Performance Measure](#)

Number	Type	Performance Measure	
1	Target	Percent of X completed within 30 days. 78 %	Delete
2	Statement	-No Statement-	Delete

Performance Measure 2

Measure description

Question Performance Measure

2011 - 0103 [My first added objective](#) \$0 Working Chapter 1: Program Planning and Evaluation [Delete](#)

Objective Performance Measure Grantee Activities

[Add a New Performance Measure](#)

Number	Type	Performance Measure	
1	Target	Percent of X completed within 30 days. 78 %	Delete
2	Statement	This is my statement performance measure.	Delete
3	Question	-No Question Text-	Delete

Performance Measure 3

Measure description

Answer

☐ No ☐ Yes

4. Select the Grantee Activities tab.

2011 - 0103 [My first added objective](#) \$0 Working Chapter 1: Program Planning and Evaluation [Delete](#)

Objective Performance Measure Grantee Activities

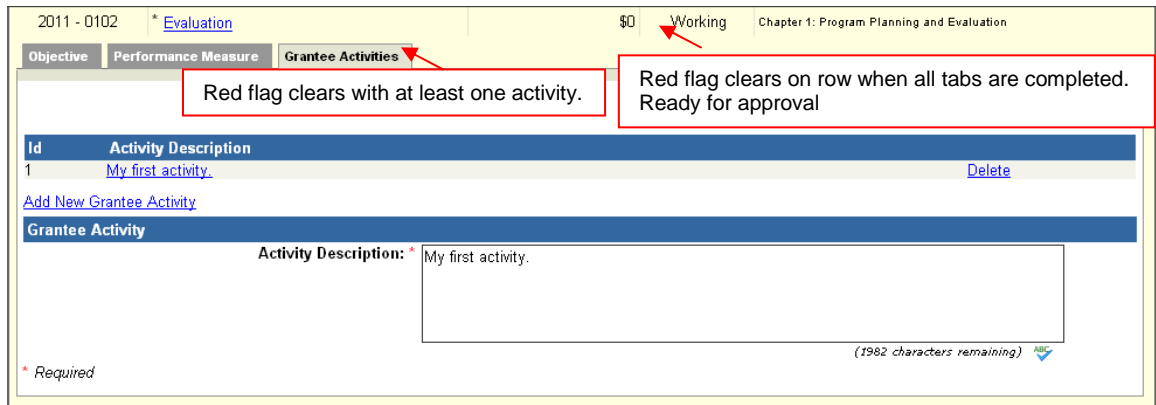
Id	Activity Description	Timeline
Add New Grantee Activity		

* Required

a. Select the "Add New Grantee Activity" link.

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b. Provide the Activity Description.



2011 - 0102 * [Evaluation](#) \$0 Working Chapter 1: Program Planning and Evaluation

Objective Performance Measure **Grantee Activities**

Red flag clears with at least one activity.


Red flag clears on row when all tabs are completed. Ready for approval

Id	Activity Description	
1	My first activity.	Delete

[Add New Grantee Activity](#)

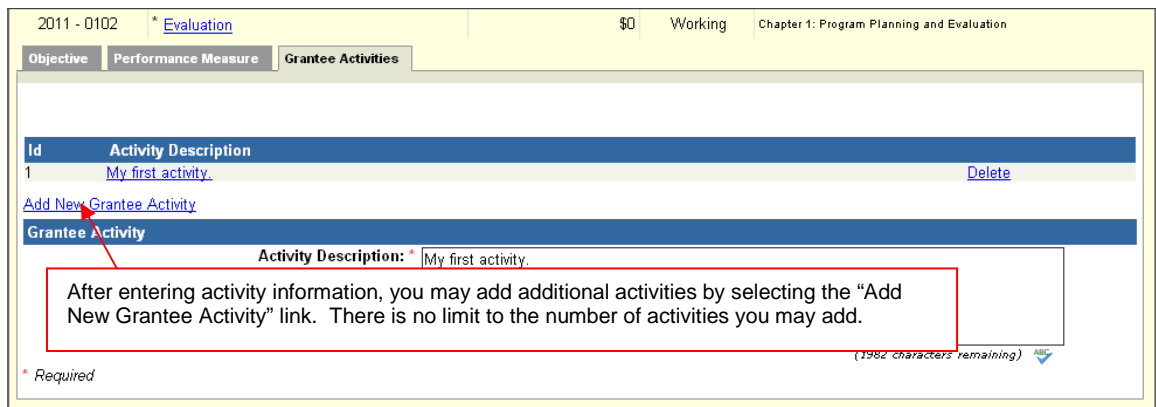
Grantee Activity

Activity Description: *

(1982 characters remaining) 

* Required

c. Enter additional activities by selecting the Add New Grantee Activity link.



2011 - 0102 * [Evaluation](#) \$0 Working Chapter 1: Program Planning and Evaluation


Objective Performance Measure **Grantee Activities**

Id	Activity Description	
1	My first activity.	Delete

[Add New Grantee Activity](#)

Grantee Activity

Activity Description: *

(1982 characters remaining) 

* Required

After entering activity information, you may add additional activities by selecting the "Add New Grantee Activity" link. There is no limit to the number of activities you may add.

E. Edit Optional Objective

1. Click the Objective name link (to the right of the Objective Number) to expand the Objective details.
2. Edit information as needed.

- **Tip:** The Objective name link behaves as a toggle to open and close its details. Selecting another Objective will close the details of the current Objective and open the details of the selected Objective.
- **Tip:** There are two ways to select text for editing: Click on the text with the mouse or tab to the text area and press the space bar.

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F. Delete Optional Objective

You may only delete a Optional Objectives you have added in addition to the Required Objectives.

When you delete an Optional Objective, the system will automatically re-number the Optional Objectives so there are no gaps in the numbers grouped by chapters.

2011 - 0401	* AFIX Standards	\$0	Untouched	Chapter 4: Provider Quality Assurance	
2011 - 0402	* Develop a methodology	\$0	Untouched	Chapter 4: Provider Quality Assurance	
2011 - 0403	My first added Objective for Chapter 4	\$0	Working	Chapter 4: Provider Quality Assurance	Delete
2011 - 0404	My second added objective for Chapter 4	\$0	Working	Chapter 4: Provider Quality Assurance	Delete
2011 - 0501	* Maintain protocol	\$0	Untouched	Chapter 5: Perinatal Hepatitis B Prevention	
2011 - 0502	* Educate providers	\$0	Untouched	Chapter 5: Perinatal Hepatitis B Prevention	

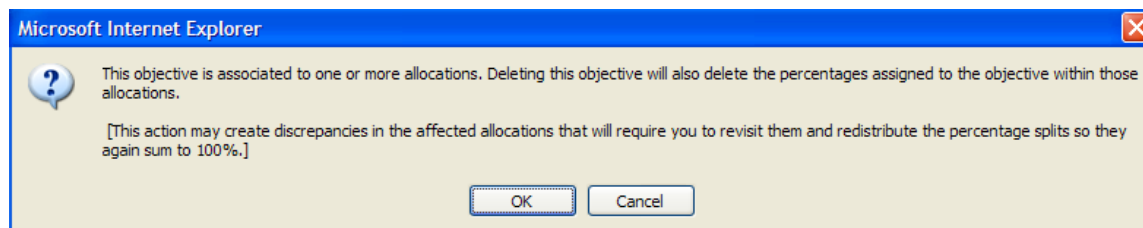
1. Select the Delete link of the Objective you want to delete.
For our example, let's delete 2012-0403.

2011 - 0402	* Develop a methodology	\$0	Untouched	Chapter 4: Provider Quality Assurance	
2011 - 0403	My first added Objective for Chapter 4	\$0	Working	Chapter 4: Provider Quality Assurance	Delete
2011 - 0404	My second added objective for Chapter 4	\$0	Working	Chapter 4: Provider Quality Assurance	Delete
2011 - 0501	* Maintain protocol	\$0	Untouched	Chapter 5: Perinatal Hepatitis B Prevention	
2011 - 0502	* Educate providers	\$0	Untouched	Chapter 5: Perinatal Hepatitis B Prevention	

2. Confirm deletion by selecting OK.

2011 - 0306	* National data queries	\$0	Untouched	Chapter 3: Immunization Information Systems	
2011 - 0307	* Functional standards	\$0	Untouched	Chapter 3: Immunization Information Systems	
2011 - 0401	* AFIX Standards			Quality Assurance	
2011 - 0402	* Develop a methodology			Quality Assurance	
2011 - 0403	My first added Objective for Chapter 4			Quality Assurance	Delete
2011 - 0404	My second added objective for Chapter 4			Quality Assurance	Delete
2011 - 0501	* Maintain protocol			Hepatitis B Prevention	
2011 - 0502	* Educate providers			Hepatitis B Prevention	
2011 - 0503	* Case management	\$0	Untouched	Chapter 5: Perinatal Hepatitis B Prevention	

If the Objective has been associated to an allocation in the budget, the system will provide the following message:






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Note: This action may cause discrepancies in the affected allocations that will require you to revisit them and redistribute the percentage splits so they again sum to 100%.

3. Select OK to continue with the deletion.

Notice that objective 2012-0404 becomes 2012-0403 to fill in the gap.

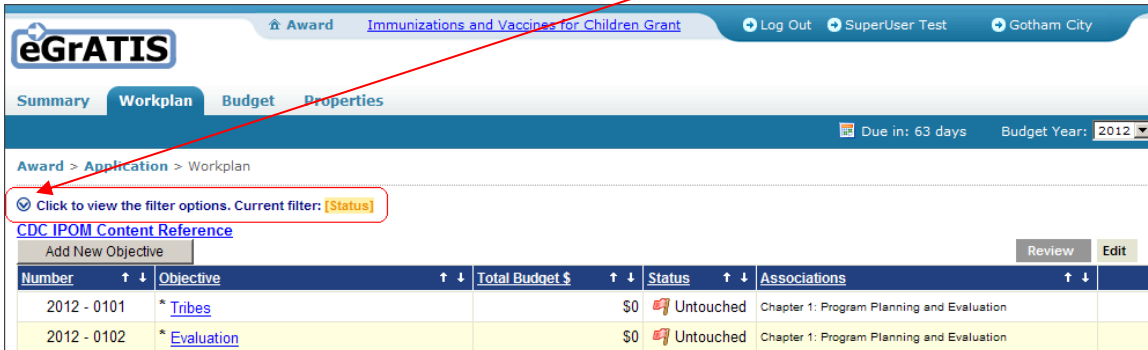
2011 - 0401	* AFIX Standards	\$0	 Untouched	Chapter 4: Provider Quality Assurance
2011 - 0402	* Develop a methodology	\$0	 Untouched	Chapter 4: Provider Quality Assurance
2011 - 0403	My second added objective for Chapter 4	\$0	 Working	Chapter 4: Provider Quality Assurance Delete
2011 - 0501	* Maintain protocol	\$0	 Untouched	Chapter 5: Perinatal Hepatitis B Prevention
2011 - 0502	* Educate providers	\$0	 Untouched	Chapter 5: Perinatal Hepatitis B Prevention

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G. Filter Objectives List

When looking for a specific Objective, you may choose to filter the list.

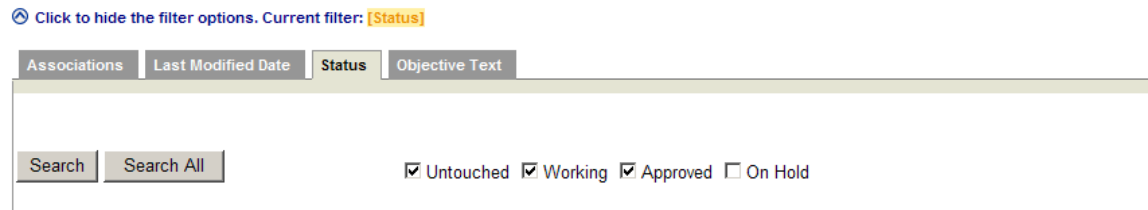
1. Expand the filter by selecting the circled down arrow .



The screenshot shows the eGrATIS interface for the 'Immunizations and Vaccines for Children Grant'. The 'Workplan' tab is selected. A dropdown menu is open, showing 'Click to view the filter options. Current filter: [Status]'. Below the dropdown is a table of objectives:

Number	Objective	Total Budget \$	Status	Associations
2012 - 0101	* Tribes	\$0	Untouched	Chapter 1: Program Planning and Evaluation
2012 - 0102	* Evaluation	\$0	Untouched	Chapter 1: Program Planning and Evaluation

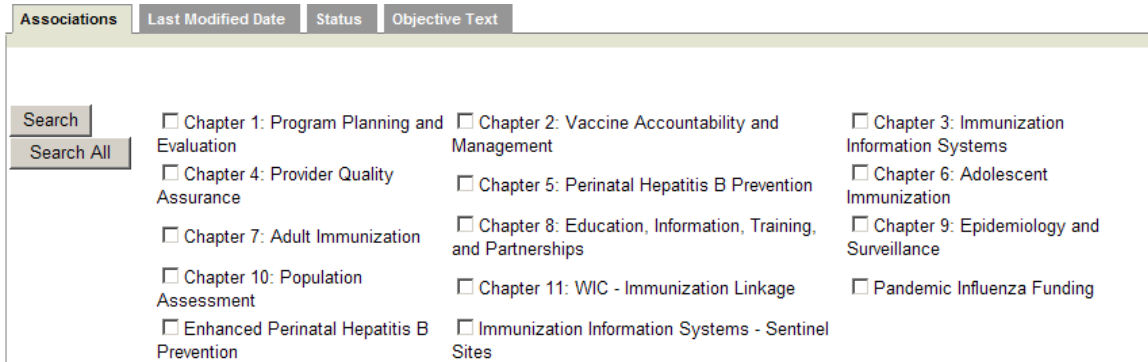
The filter is expanded. The default is to show Objectives of all status types.



The expanded filter options are shown, including tabs for 'Associations', 'Last Modified Date', 'Status', and 'Objective Text'. The 'Status' tab is selected, showing checkboxes for 'Untouched', 'Working', 'Approved', and 'On Hold'. All are checked.

2. Select the desired Criteria tab.

Associations



The 'Associations' filter tab is selected, showing a list of checkboxes for various chapters and programs:

- ☐ Chapter 1: Program Planning and Evaluation
- ☐ Chapter 2: Vaccine Accountability and Management
- ☐ Chapter 3: Immunization Information Systems
- ☐ Chapter 4: Provider Quality Assurance
- ☐ Chapter 5: Perinatal Hepatitis B Prevention
- ☐ Chapter 6: Adolescent Immunization
- ☐ Chapter 7: Adult Immunization
- ☐ Chapter 8: Education, Information, Training, and Partnerships
- ☐ Chapter 9: Epidemiology and Surveillance
- ☐ Chapter 10: Population Assessment
- ☐ Chapter 11: WIC - Immunization Linkage
- ☐ Pandemic Influenza Funding
- ☐ Enhanced Perinatal Hepatitis B Prevention
- ☐ Immunization Information Systems - Sentinel Sites

Last Modified Date



The 'Last Modified Date' filter tab is selected, showing a date range filter: 'Between Dates: 5/14/2011 - 7/13/2011'.

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Status

Associations
Last Modified Date
Status
Objective Text

Search
Search All
☒ Untouched
☒ Working
☒ Approved
☐ On Hold

Objective Text

Associations
Last Modified Date
Status
Objective Text

Search
Text Search:

H. Objective Funding Breakout


From the Workplan, you can view which line items and how much of which funding sources are tied to each objective. Before you can see this breakout, the objective must be associated to a funded line item.

To open the Objective Funding Breakout, first place your cursor next to the Total Budget amount for the objective to cause the icon to display.

2011 - 0512	* Educate hospitals on birth dose	\$0
2011 - 0601	* Increase teen coverage rates	\$41,665
2011 - 0602	* Juvenile facilities and social service agencies	\$34,820

Select the icon.

The Funding Breakout opens showing the amount per funding source is budgeted for this objective.

2011 - 0601	* Increase teen coverage rates	\$41,665	 Untouched	Chapter 6: Adolescents
2011 - 0602	* Juvenile facilities and social service agencies			
2011 - 0801	* Staff orientation			
2011 - 0802	* Clinical staff view			
2011 - 0803	* NCVIA			
2011 - 0901	* Congenital Rubella			

Funding Breakout		
Source	Line Item	
Funding Source	Amount	
317 OPS	\$8,705.00	
VFC OPS	\$32,960.00	

Select the Line Item tab. This view shows which line items are associated to the objective.

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Below you will see that the “Increase teen coverage rates” objective is associated to “John Doe (Public Health Medical Officer)”. This line item is funded by 317 OPS and VFC OPS. A portion of these funds for this line item are budgeted toward this objective.

2011 - 0601	* Increase teen coverage rates	\$41,665	Untouched	Chapter 6: Adolescents
2011 - 0602	* Juvenile facilities			
2011 - 0801	* Staff orientation			
2011 - 0802	* Clinical staff view			
2011 - 0803	* NCVIA			
2011 - 0901	* Congenital Rubella			
2011 - 0902	* Case reports to			

Funding Breakout				
Source		Line Item		
Source	Category	Description	\$ Total	\$ Objective
317 OPS	FA-Personnel	John Doe (Public Health Medical Officer)	\$87,050.00	\$8,705.00
VFC OPS	FA-Personnel	John Doe (Public Health Medical Officer)	\$41,200.00	\$32,960.00

Select the active link to go to the line item for the given funding source.

VIII. Review, Approve and Print Application Workplan

The following tasks are covered in this section:

- Access Workplan Summary – Review Mode
- Approve Objectives
- Print Objectives

Only users with Super User or User Level 1 role can *approve* Workplan Objectives.

All users may print Workplan Objectives from the Workplan.

A. Access Workplan Summary – Review Mode

You may access the Work Plan from the navigation link [Work Plan](#) or by selecting the Work Plan section link [Work Plan Overview](#) on the **Application > Summary** page. The system will display the **Application > Workplan** page defaulted in Edit Mode, where Objectives may be added, edited and deleted.

Select the Review Mode tab to print and approve Objectives. (See *section VII Create Application Work Plan* above.)




B. Approve Objectives

All Objectives must be approved before the application may be submitted. If staff with a User Level less than Super User were responsible for entering data into the Workplan, an internal review may be required as only a Super User can approve objectives. For example, if a data entry person with User Level 2 enters the Objectives for the IIS Section, then someone with Super User or User Level 1 role will need to go to the Review Mode tab, review the entries and approve them.

Any Objectives that have not been approved will count as a Workplan discrepancy, which will be seen on the Application Summary page under the Workplan View Discrepancies section.

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Before an Objective can be approved, all required information must be entered. If information is missing the status will display a red flag  **Working**. Scroll through the Objective to see what specific information has not been addressed.

1. From the Workplan page, select the Review Mode tab. The system will display a read-only summary view of all Objectives.
2. Select the checkbox under the Select column for each Objective to be approved or select the “Select All” button.

Select individual objectives or choose the Select All button.

Select	Number	Objective	Total Budget \$	Status																			
<input checked="" type="checkbox"/>	2011-0101	Objective Name: Tribes Opt Out: Yes Opt Out Reason: We do not have any federally or state recognized tribes. Statement: As part of the grant application and progress reports, grantees must submit documentation that describes how tribes are involved in the planning and implementation of immunization program activities for AI/AN populations Grantee Activities: Associate to Components: <table border="1"> <thead> <tr> <th>Component</th> <th>Split %</th> </tr> </thead> <tbody> <tr> <td>Chapter 1: Program Planning and Evaluation</td> <td>100%</td> </tr> </tbody> </table> Performance Measures: <table border="1"> <thead> <tr> <th>Number</th> <th>Type</th> <th>Performance Measure</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Statement</td> <td>Submission of documentation as appendix to grant application. (Attach this document via eGrATIS using the Attachments section located on the Application Summary page. Use the Attachment Type = Chapter 1, Tribes.)</td> </tr> </tbody> </table>	Component	Split %	Chapter 1: Program Planning and Evaluation	100%	Number	Type	Performance Measure	1	Statement	Submission of documentation as appendix to grant application. (Attach this document via eGrATIS using the Attachments section located on the Application Summary page. Use the Attachment Type = Chapter 1, Tribes.)	\$0	Working									
Component	Split %																						
Chapter 1: Program Planning and Evaluation	100%																						
Number	Type	Performance Measure																					
1	Statement	Submission of documentation as appendix to grant application. (Attach this document via eGrATIS using the Attachments section located on the Application Summary page. Use the Attachment Type = Chapter 1, Tribes.)																					
<input checked="" type="checkbox"/>	2011-0102	Objective Name: Evaluation Statement: All grantees are required to develop and submit an evaluation plan for a component of their program to CDC. Grantee Activities: <table border="1"> <thead> <tr> <th>Id</th> <th>Activity Description</th> <th>Timeline</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>My first activity.</td> <td>04/20/2011</td> </tr> </tbody> </table> Associate to Components: <table border="1"> <thead> <tr> <th>Component</th> <th>Split %</th> </tr> </thead> <tbody> <tr> <td>Chapter 1: Program Planning and Evaluation</td> <td>100%</td> </tr> </tbody> </table> Performance Measures: <table border="1"> <thead> <tr> <th>Number</th> <th>Type</th> <th>Performance Measure</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Question</td> <td>Development of an evaluation plan. Yes</td> </tr> <tr> <td>2</td> <td>Statement</td> <td>Adolescent Vaccination, Adult Vaccination, Education/Training, IIS, Population Assessment</td> </tr> </tbody> </table>	Id	Activity Description	Timeline	1	My first activity.	04/20/2011	Component	Split %	Chapter 1: Program Planning and Evaluation	100%	Number	Type	Performance Measure	1	Question	Development of an evaluation plan. Yes	2	Statement	Adolescent Vaccination, Adult Vaccination, Education/Training, IIS, Population Assessment	\$0	Working
Id	Activity Description	Timeline																					
1	My first activity.	04/20/2011																					
Component	Split %																						
Chapter 1: Program Planning and Evaluation	100%																						
Number	Type	Performance Measure																					
1	Question	Development of an evaluation plan. Yes																					
2	Statement	Adolescent Vaccination, Adult Vaccination, Education/Training, IIS, Population Assessment																					

 **Tip:** If choose “Select All”, the system toggles to button to “Unselect All”.

Unselect all	Print Selected	Approve Selected
Select	Number	Objective

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3. Click the “Approved Selected” button.



The screenshot shows a toolbar with buttons: 'Select All', 'Print Selected', and 'Approve Selected'. The 'Approve Selected' button is highlighted with a red rectangular box. Below the toolbar is a table with columns: 'Select', 'Number', 'Objective', 'Total Budget \$', and 'Status'.

The Status changes to Approved.

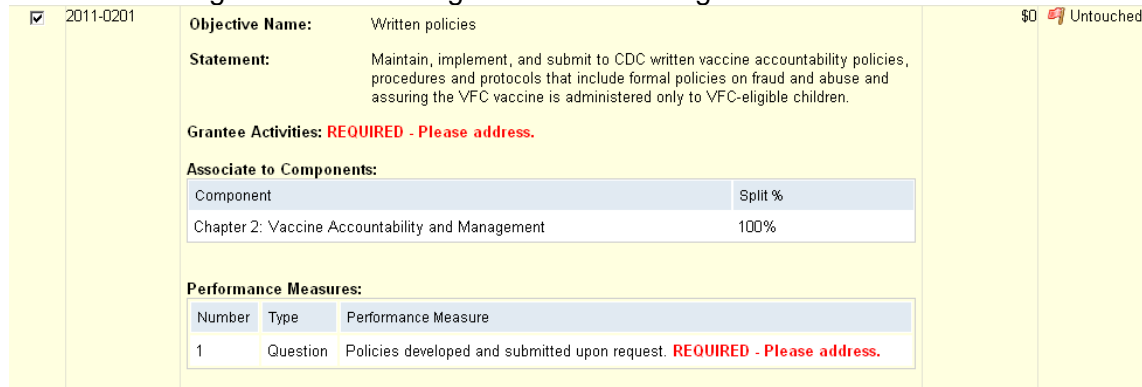


The screenshot shows the same toolbar as before. Below it, the table row for objective 2011-0101 is shown. The 'Status' column now displays 'Approved' in green text, which is highlighted with a red rectangular box. The 'Objective Name' is 'Tribes' and the 'Total Budget \$' is '\$0'.

Note: An Objective that is still in Untouched status or is missing information cannot be approved. If you attempt to approve one of these, the system will indicate a message and the Objective number(s).

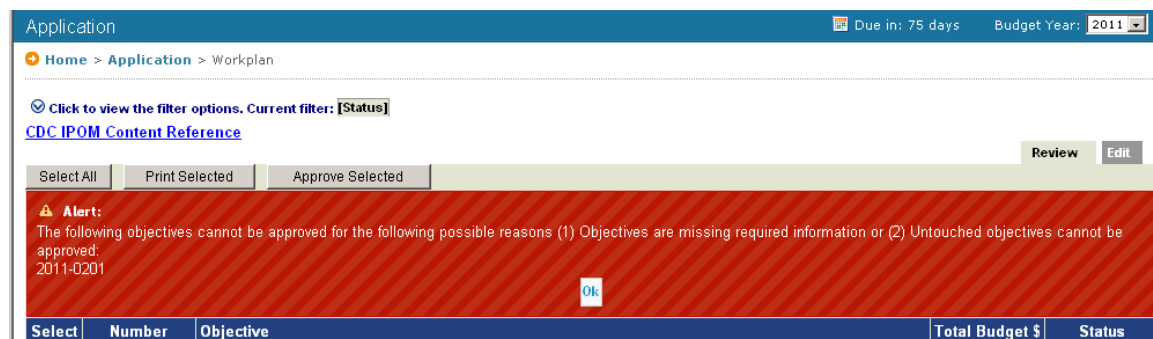
For example, Written Policies objective has not been touched and is missing information.

The red flag and error messages indicate missing information.



The screenshot shows a detailed view of objective 2011-0201. It has a red flag icon and the status 'Untouched'. The 'Objective Name' is 'Written policies'. The 'Statement' is 'Maintain, implement, and submit to CDC written vaccine accountability policies, procedures and protocols that include formal policies on fraud and abuse and assuring the VFC vaccine is administered only to VFC-eligible children.' The 'Grantee Activities' section shows 'REQUIRED - Please address.' The 'Associate to Components' table shows 'Chapter 2: Vaccine Accountability and Management' with a 'Split %' of '100%'. The 'Performance Measures' table shows 'Policies developed and submitted upon request. REQUIRED - Please address.'

If you try to mark the objective Approved, the system will provide an error message and indicate which objective(s) has the issue(s).



The screenshot shows the application header with 'Due in: 75 days' and 'Budget Year: 2011'. Below the header, there is a filter section with 'Click to view the filter options. Current filter: [Status]'. A red banner message reads: 'Alert: The following objectives cannot be approved for the following possible reasons (1) Objectives are missing required information or (2) Untouched objectives cannot be approved. 2011-0201'. An 'Ok' button is visible below the message. Below the banner is the same table as in the previous screenshots.

Select OK.

If you had more than one objective selected, all Objectives except the ones listed in the message will be moved to an Approved status.

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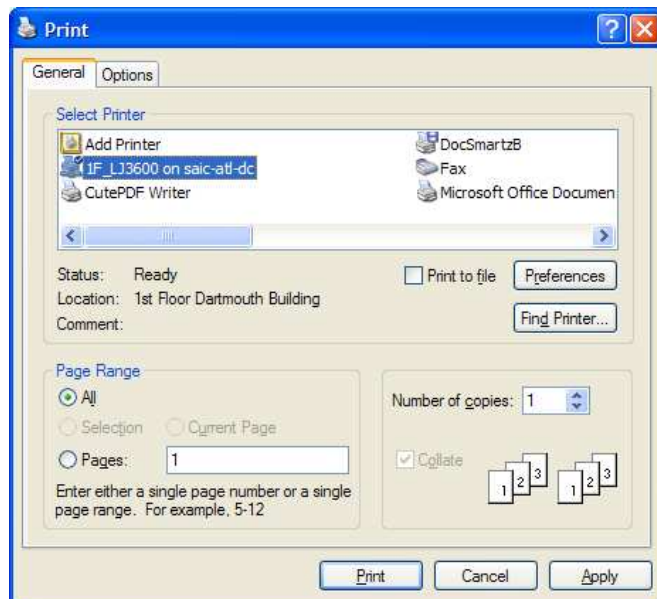
Those that are missing information must be updated in the Edit Mode tab.

C. Print Objectives

1. From the Workplan page, select the Review Mode tab. The system will display a summary view of the Objectives.
2. Select the checkboxes under the Select column for each Objective to be printed. (Or choose "Select All" button to print all.)
3. Click the "Print Selected" button. The system will generate a report of the selected Objectives and open a Print window.

Review Edit				
Select All	Print Selected	Approve Selected		
Select	Number	Objective	Total Budget \$	Status
<input checked="" type="checkbox"/>	2011-0101	Objective Name: Tribes	\$0	Working

The print dialog will appear.



- **TIP:** Printing as a PDF will save it to a file and maintain formatting. There are free PDF Writers; however, please see your IT administrator for assistance.

Application 2012 User Guide for eGrATIS

IX. Create Application Budget

The following tasks are covered in this section:

- Set Application Properties (Budget Value Defaults)
- Access Budget Summary
- Access Line Items
- Load 2011 Line Item
- Add New Line Item
- Copy Line Item to Another Funding Source
- Edit Line Item
- Delete Line Item

For each line item, in addition to the financial values, you are required to:

- Enter a Budget Justification and
- Associate the allocation to your Workplan Objective(s).

The 2011 Application budget is not pre-populated; however, the system provides the ability to search for and copy a 2011 line item into a funding source/budget category view. See *“Load 2011 Line Item” below in this chapter.*

Targets (a.k.a., Planning Ceilings) are provided for each funding source, except state funding. The system will provide an Error discrepancy if a funding source is over-allocated.

You must ensure that all your Workplan Objectives are funded by the budget. For each line item, when funds are allocated, designate how these funds relate to the workplan objectives using the line item's Objectives tab. For example, the equipment is supporting several Chapter 3 - IIS objectives. Creating this link builds a budget per objective which is visible to you on the screen. (More info provided below.)

Changes made to your Workplan may cause budget re-work if budget line items are associated to objectives **before** the workplan is completed.

- If an Optional Objective is deleted after associated to a line item, this association is removed causing need for adjustment to the line item.
- If an Optional Objective is added, it is not yet funded so it must then be associated to the appropriate line items.
- If a Required Objective is marked as not applicable after associated to a line item, this association is removed causing need for adjustment to the line item.

Application 2012 User Guide for eGrATIS

Funding Source focused Budget

In 2012, each funding source is managed separately as you build the budget. The idea is to build a 317 OPS budget, VFC OPS budget, etc, keeping the line items for a funding source separate. So if a Database Administrator for \$60,000 is funded by three funding sources, you will have the Database Administrator line item in those three views: 317 OPS/Personnel view, VFC OPS/Personnel view, and VFC AFIX/Personnel view.

- ➔ The system provides a search line item feature so you do not have to re-enter a line item into each funding source it is funded by.
- ➔ The system provides the ability to switch to the same line item in another funding source with one click.
- ➔ The system provides a view of the funding source Target, total allocated amount and total remaining amount on the page where you build the budget. These dynamically change as you allocate funds so you are always aware of the current amounts.

Examples: How to Build your Budget

Below are examples of paths to build the budget to provide a sense of the workflow in the budget.

Example 1: Complete the budget for one funding source across budget categories. Then move on to the next funding source.

Jane wants to complete the 317 OPS budget first.

She decides to start entering Personnel for 317 OPS. She searches and selects those that were in the budget last year. She updates the details (e.g., % FTE, Salary), allocates the 317 OPS portion of the line item, and associates the line item to appropriate workplan objectives. New staff members are manually entered. The 317 OPS portion is allocated and appropriate objectives are associated to the line items.

After completing the 317 OPS budget for Personnel, Jane moves to the Travel budget category for 317 OPS funds. Again, she chooses to search for line items from last year or enter new line items. As each line item is entered, she allocates the 317 OPS amount and associates to appropriate objectives.

After completing the 317 OPS budget for Travel, she moves on to complete the remaining budget categories following the same process.

After completing all of the line items for 317 OPS in all the budget categories, Jane starts with the Personnel for VFC OPS, following the same process she used for 317 OPS.

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This process is continued for all funding sources.

Example 2: Complete the budget for a budget category across all funding sources. Then move on to the next budget category.

John wants to complete all Personnel line items for all funding sources first.

He begins with 317 OPS. He searches for and selects those line items that were in the budget last year. He updates the details (e.g., % FTE, Salary), allocates the 317 OPS portion of the line item, and associates the line item to appropriate workplan objectives. New staff members are manually entered. The 317 OPS portion is allocated and appropriate objectives are associated to the line items.

After completing Personnel for 317 OPS, he switches to Personnel for VFC OPS. The line items are not automatically carried over from 317 OPS. Some personnel funded by 317 OPS are also funded by VFC OPS. He searches for and copies those line items into the VFC OPS/Personnel view. He then enters the portion of the line items funded by VFC OPS and associates to appropriate objectives. There are some staff members that are only funded with VFC OPS. He manually adds these line items.

After completing the Personnel for VFC OPS, he continues building the Personnel budget for the remaining funding sources, where applicable.

He then moves on to the next budget category using this process until all budget categories are completed.

“State Funds” Funding Source (OPTIONAL)

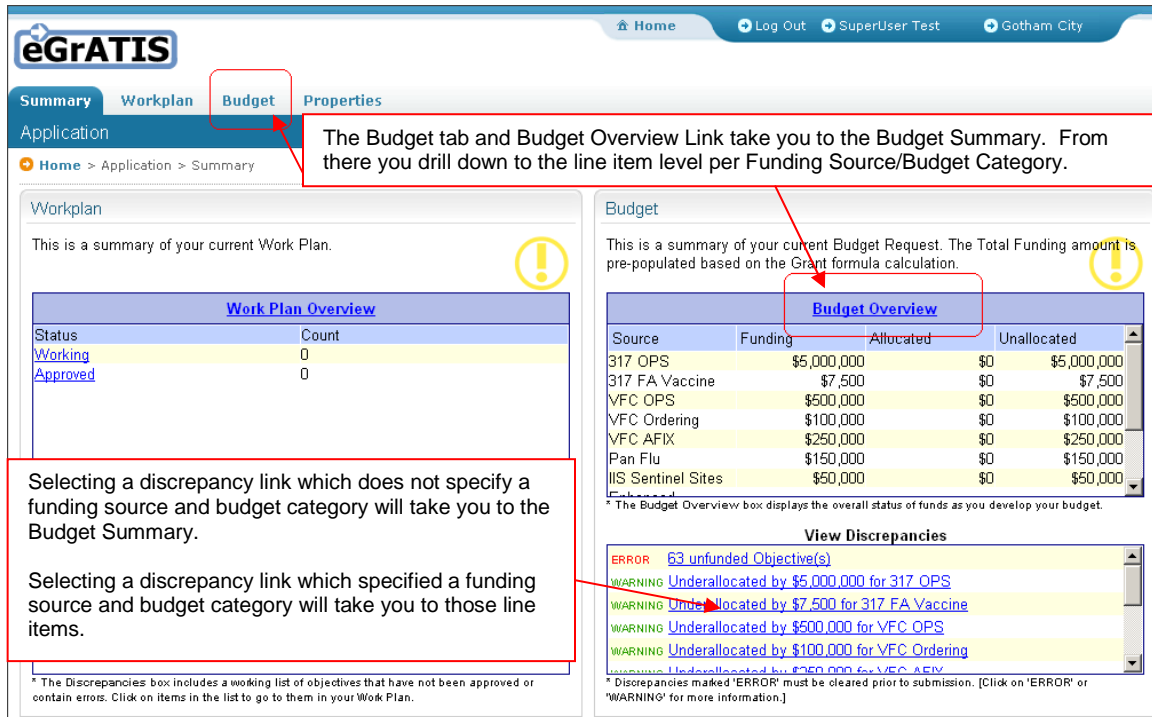
eGrATIS includes a State Funds funding source so that grantees may represent their entire budget, including state-funded activities. This amount will NOT be included in the amount requested as Grant Awards, nor will this amount be reflected in the Notice of Award received at the beginning of the grant year. It will be represented in some of the generated reports.

Application 2012 User Guide for eGrATIS

A. Set Application Properties (Budget Value Defaults)

On the **Application > Summary** page, the system will display the Budget Overview which provides a view of the total dollars budgeted.

You may access the **Budget** from the navigation link or by selecting the **Budget Overview** link as shown below.



The Budget tab and Budget Overview Link take you to the Budget Summary. From there you drill down to the line item level per Funding Source/Budget Category.

Selecting a discrepancy link which does not specify a funding source and budget category will take you to the Budget Summary.

Selecting a discrepancy link which specified a funding source and budget category will take you to those line items.

The Budget Overview box displays the overall status of funds as you develop your budget.

The Discrepancies box includes a working list of objectives that have not been approved or contain errors. Click on items in the list to go to them in your Work Plan.

The Discrepancies marked 'ERROR' must be cleared prior to submission. [Click on 'ERROR' or 'WARNING' for more information.]

Source	Funding	Allocated	Unallocated
317 OPS	\$5,000,000	\$0	\$5,000,000
317 FA Vaccine	\$7,500	\$0	\$7,500
VFC OPS	\$500,000	\$0	\$500,000
VFC Ordering	\$100,000	\$0	\$100,000
VFC AFIX	\$250,000	\$0	\$250,000
Pan Flu	\$150,000	\$0	\$150,000
IIS Sentinel Sites	\$50,000	\$0	\$50,000

View Discrepancies

ERROR 63 unfunded Objective(s)

WARNING Underallocated by \$5,000,000 for 317 OPS

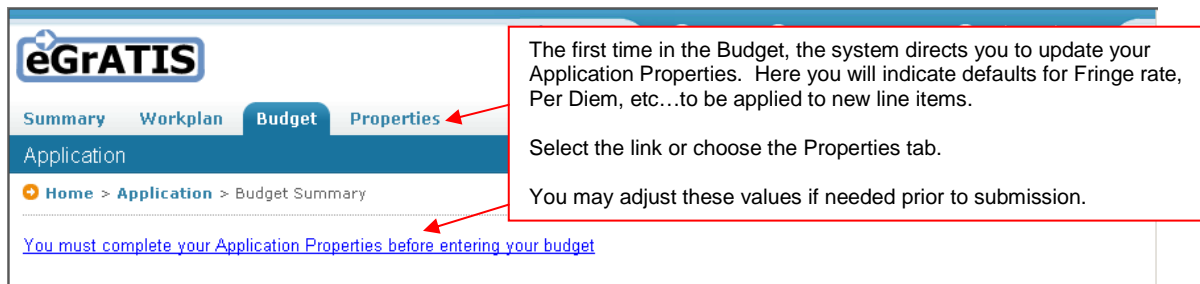
WARNING Underallocated by \$7,500 for 317 FA Vaccine

WARNING Underallocated by \$500,000 for VFC OPS

WARNING Underallocated by \$100,000 for VFC Ordering

WARNING Underallocated by \$250,000 for VFC AFIX

Application Properties default amounts and rates must be verified/updated before starting on the Budget. *If you attempt to access the budget before updating these properties, you will see the following:*



The first time in the Budget, the system directs you to update your Application Properties. Here you will indicate defaults for Fringe rate, Per Diem, etc...to be applied to new line items.


Select the link or choose the Properties tab.

You may adjust these values if needed prior to submission.

You must complete your Application Properties before entering your budget

Select this link.

The system displays the Application Properties page. The Default Rates/Amounts values are pre-populated from the 2011 application.



[Award](#) [Immunizations and Vaccines for](#)

[Summary](#) [Workplan](#) [Budget](#) [Properties](#)

Application Properties

Default Rates / Amounts:

These values will be used to calculate data in your budget.

Fringe Rate:	<input type="text" value="38.00"/>
Fringe Amount:	<input type="text" value="0.00"/>
Per Diem Amount:	<input type="text" value="75.00"/>
AmtMileage:	<input type="text" value="0.5000"/>
<input type="button" value="Update"/>	

Indirect Cost Components:

No Cost Components Defined for this Application

[Add a Component to the Calculation](#)

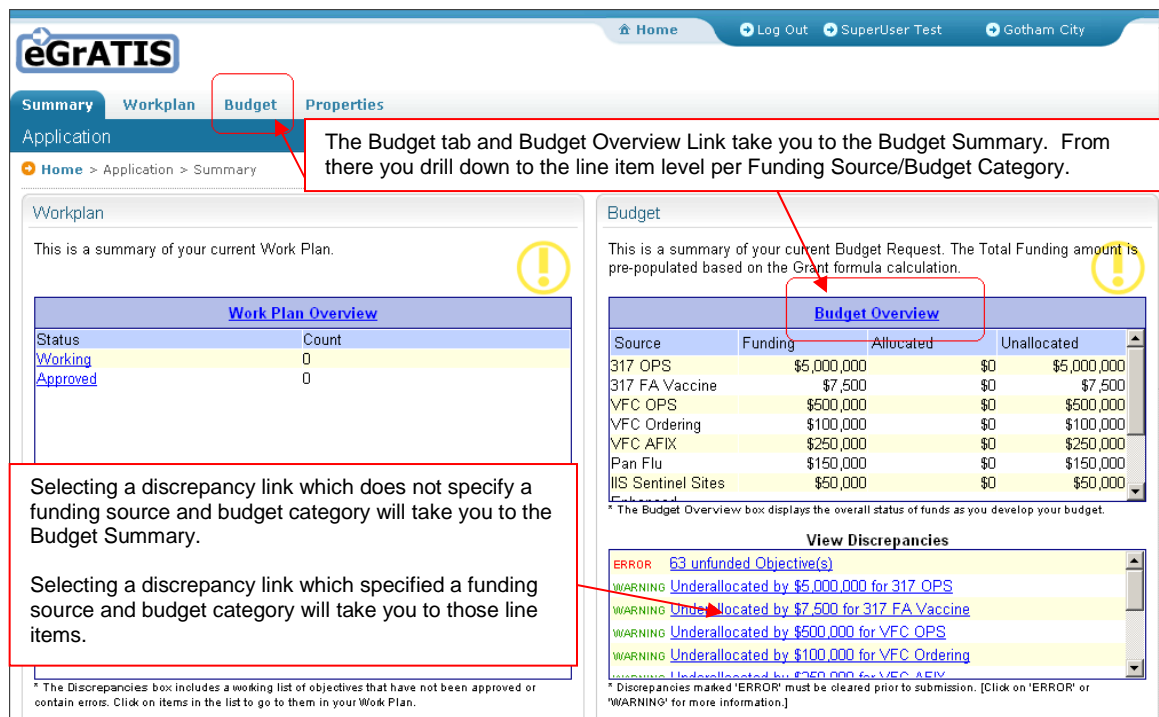
See section VI. Set Application Properties for step-by-step instructions on completing the properties.

Application 2012 User Guide for eGrATIS

B. Access Budget Summary

After completing the Application Properties in Section A above, the system will open the **Application > Budget Summary** page.

However, if the Properties were already completed, you may directly access the **Budget Summary** from the **Budget** tab or by selecting the **Budget Overview** link as shown below.



The Budget tab and Budget Overview Link take you to the Budget Summary. From there you drill down to the line item level per Funding Source/Budget Category.

Selecting a discrepancy link which does not specify a funding source and budget category will take you to the Budget Summary.

Selecting a discrepancy link which specified a funding source and budget category will take you to those line items.

Work Plan Overview

Status	Count
Working	0
Approved	0

Budget Overview

Source	Funding	Allocated	Unallocated
317 OPS	\$5,000,000	\$0	\$5,000,000
317 FA Vaccine	\$7,500	\$0	\$7,500
VFC OPS	\$500,000	\$0	\$500,000
VFC Ordering	\$100,000	\$0	\$100,000
VFC AFIX	\$250,000	\$0	\$250,000
Pan Flu	\$150,000	\$0	\$150,000
ILIS Sentinel Sites	\$50,000	\$0	\$50,000

View Discrepancies

ERROR: 63 unfunded Objective(s)

WARNING: Underallocated by \$5,000,000 for 317 OPS

WARNING: Underallocated by \$7,500 for 317 FA Vaccine

WARNING: Underallocated by \$500,000 for VFC OPS

WARNING: Underallocated by \$100,000 for VFC Ordering

WARNING: Underallocated by \$250,000 for VFC AFIX

* The Discrepancies box includes a working list of objectives that have not been approved or contain errors. Click on items in the list to go to them in your Work Plan.

* Discrepancies marked 'ERROR' must be cleared prior to submission. [Click on 'ERROR' or 'WARNING' for more information.]

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BUDGET SUMMARY - Redesign

Accessing list of line items:

Last year you selected the budget category (e.g., Personnel) link to see line items. This year you select link for the Funding Source/Budget Category (a.k.a., Object Class) intersection to access the line items (e.g., \$0 link for 317 OPS/Personnel shows Personnel line items funded by 317 OPS). As you allocate funds to line items, the amounts will update in the Budget Summary table. This redesign is part of moving to a Funding Source focused Budget.

Breakout Graphs:

The Budget Category (a.k.a., Object Class) link takes you to a Breakout of the Budget Category by Funding Source. The Breakout of Funding Source by Budget Category is moved from the Grand Total row to the Funding Source link at the top of the table.

State Funds:

In prior years, some grantees logged line items funded by State Funds with \$0. For example, Sally Johnson was entered with \$0 salary. This year, you may allocate funds to the State Funds funding source. These will NOT be included in the Grant Award totals and will not be reflected on the Notice of Award received from CDC.

Summary

Workplan

Budget

Properties

Application

Home > Application > Budget Summary

State Funds are not part of the Grant Award. This option allows you to build a budget with exposure of State Funds to be used. You do NOT have to allocate to State Funds.

2012 Application Funding Sources

You will only see funding sources applicable to you.

Breakout of Funding Source by Budget Category

		Vaccine	OPS	Contracting	AFIX	F				State Funds	Total
Funding											
Planning Ceiling	\$5,000,000	\$7,500	\$500,000	\$100,000	\$250,000	\$150,000	\$50,000	\$95,000	\$60,000	N/A	\$6,212,500
Unallocated Funds	\$5,000,000	\$7,500	\$500,000	\$100,000	\$250,000	\$150,000	\$50,000	\$95,000	\$60,000	N/A	\$6,212,500
Financial Assistance											
Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Fringe	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Travel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Equipment	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Supplies	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Contractual	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Vaccine	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Direct FA	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Indirect	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total (Financial Assistance)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Direct Assistance											
Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total (Direct Assistance)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Grand Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Breakout of Budget Category by Funding Source

Select \$ link to view line items for given funding source/budget category pair. E.g., VFC OPS/Contractual. Once funds are allocated, the values will be added to the table.

Vaccine can only be funded by 317 FA Vaccine

If you have DA Personnel, the values will show because line items are pre-populated.

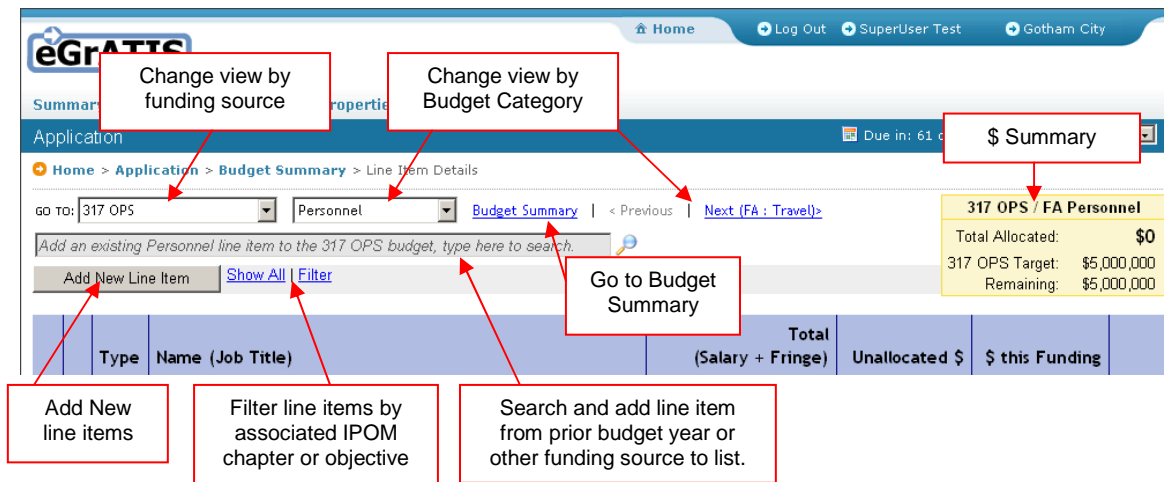
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- Note:** Once you have allocated funds to a line item, the values will be added to this summary table.
- Note:** Vaccine line items are only funded by 317 FA Vaccine. If you do not have 317 FA Vaccine, you cannot request allocations for Vaccine.

C. Access Line Items

On the **Application > Budget** page select the Budget Category/Funding Source intersection (e.g., Personnel/317 OPS, Travel/Pan Flu, or Vaccine/317 FA Vaccine). The system displays all line items for the selected budget category/funding source.

Let's say we select 317 OPS/Personnel. Initially there are no line items.



The page of line items will always display the funding source Total amount allocated for the line items in view on the page, the Funding Source Target, and Remaining amount for funding source. These will dynamically update as funds are allocated to line items.

317 OPS / FA Personnel	
Total Allocated:	\$0
317 OPS Target:	\$5,000,000
Remaining:	\$5,000,000

Total amount allocated to the line items on the page in view

Funding Source Target for the funding source in view

Remaining amount for the funding source in view

Changes are auto-saved when focus moves to another field (i.e., tab to another field in the allocation table) or another part of eGrATIS (i.e., leave this page).

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D. Load 2011 Line Items

This is a new feature to eGrATIS. Because of the new budget structure, prior year line items are not pre-populated; however, you may search and pull in a line item from last year.

Search for Line Item

The search begins looking for an item that contains the characters or series of characters you enter. You may type an “s” and see five line items to choose from. Then you type an “e”, making the search criteria “se”. The list may shorten to two line items that contain “se”.

The following information is searched per budget category:

Budget Category	Item set to 0 for 2011 line item copied into 2012
Personnel	Name, Title
Travel	Location, # of trips, Type [In State or Out of State]
Equipment	Description
Supplies	Description
Contractual	Name, Type – Method of Selection
Vaccine	Provider, # doses, Type of Vaccine
Other	Description
Indirect	Description
Personnel (DA)	Cannot copy in line items. These are pre-populated.
Other (DA)	Description

Copy in Line Item

When the line item is copied in:

- Line item details (e.g., Name, Title, Fringe rate etc.) will be copied in from last year.
- The line item total will initially be set to \$0. You must adjust the values for each line item to reflect the amount you are requesting for those line items this year.

The following values are defaulted to 0 per budget category when copying in the line item.

Budget Category	Item set to 0 for 2011 line item copied into 2012
Personnel	% FTE
Travel	# Trips
Equipment	Quantity
Supplies	Quantity
Contractual	Amount requested
Vaccine	Number of Doses
Other	Amount requested
Indirect	Amount requested
Personnel (DA)	Cannot copy in line items. These are pre-populated.

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Other (DA)	Amount requested
------------	------------------

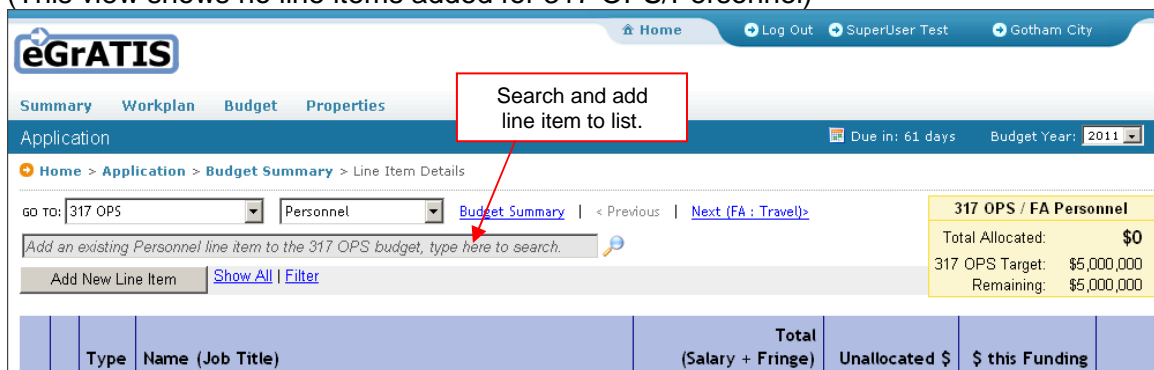
- Workplan association to objectives is not copied over from last year. You will need to associate to this year's objectives.
- **TIP:** This feature will also be used to copy newly entered line items into other funding sources. See *"Copy Line Item to Another Funding Source"* section below.

1. From the Budget Summary page, select the Funding Source/ Budget Category where you want to include the 2011 line item. For example, you want to copy in a Personnel line item into the 317 OPS funding source.

Budget Category	317 OPS	317 FA Vaccine	VFC OPS
Funding			
Planning Ceiling	\$5,000,000	\$7,500	\$500,000
Unallocated Funds	\$5,000,000	\$7,500	\$500,000
Financial Assistance			
Personnel	\$0	\$0	
Fringe	\$0	\$0	
Travel	\$0	\$0	

The **Application > Budget Summary > Line Item** Details page for 317 OPS/Personnel displays.

(This view shows no line items added for 317 OPS/Personnel)



eGrATIS Home Log Out SuperUser Test Gotham City

Summary Workplan Budget Properties

Application Due in: 61 days Budget Year: 2011

Home > Application > Budget Summary > Line Item Details

go to: 317 OPS Personnel Budget Summary < Previous Next (FA : Travel)>

Add an existing Personnel line item to the 317 OPS budget, type here to search.

Add New Line Item Show All Filter

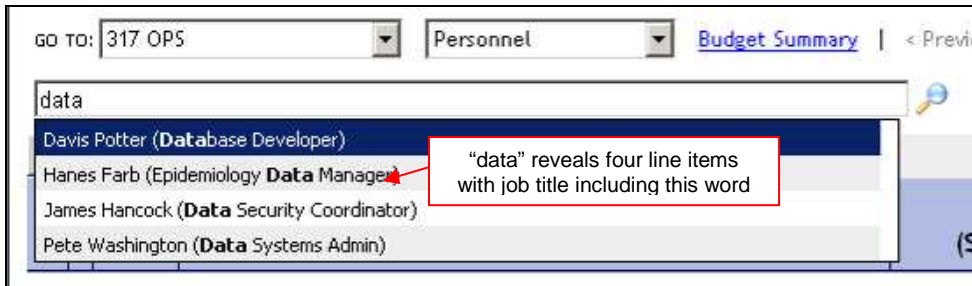
Type	Name (Job Title)	Total (Salary + Fringe)	Unallocated \$	\$ this Funding
317 OPS / FA Personnel Total Allocated: \$0 317 OPS Target: \$5,000,000 Remaining: \$5,000,000				

2. Begin to type the *name or title* of the personnel line item in the search area. (See the list in the introduction of this chapter for what values are searched in each budget categories.)

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The system provides a list of possible matches.

For example, you are searching for the Data Systems Administrator. Enter the phrase “data”.



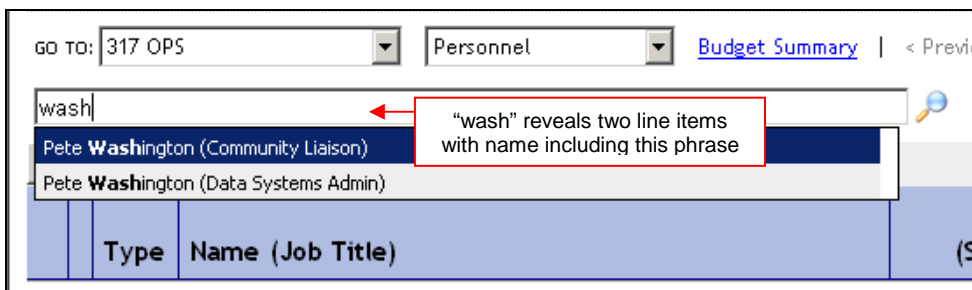
GO TO: 317 OPS Personnel [Budget Summary](#) | < Previous

data

Davis Potter (Database Developer)
Hanes Farb (Epidemiology Data Manager)
James Hancock (Data Security Coordinator)
Pete Washington (Data Systems Admin)

“data” reveals four line items with job title including this word

Or you are searching for “Pete Washington”. His position was the Data Administrator. Enter “wash”.



GO TO: 317 OPS Personnel [Budget Summary](#) | < Previous

wash

Pete Washington (Community Liaison)
Pete Washington (Data Systems Admin)

“wash” reveals two line items with name including this phrase

Type	Name (Job Title)

3. Select the match by clicking with your mouse or selecting the enter key.

For this example, we select the line item “Pete Washington (Data Systems Administrator)”. The system loads the line item to the page.

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Add New Line Item [Show All](#) | [Filter](#)

Type	Name (Job Title)	Total(Salary + Fringe)	Unallocated \$	\$ this Funding	
	Pete Washington (Data Systems Admin)	\$0	\$0		Delete

Details | Objectives | Change Log

Name: User Def

Position/Title: Budget

Salary: x

% FTE: / 100 x

Months: / 12 x

% Fringe: / 100 +

\$ Fringe: x (% FTE / 100)

Total Fringe: 0

Line Item Total is initially \$0

\$0 of 317 OPS funds allocated to this line item

Calculation

All values are set to last year's values except, % FTE.
See introduction of this chapter for other budget categories.

[View Next Allocation](#)

Complete the line item.

4. Update the **Details** tab. The line item total will be calculated.

Add New Line Item [Show All](#) | [Filter](#)

Type	Name (Job Title)	Total(Salary + Fringe)	Unallocated \$	\$ this Funding	
	Pete Washington (Data Systems Admin)	\$1,215	\$1,215		Delete

Details | Objectives | Change Log

Name: User Def

Position/Title: Budget

Salary: x

% FTE: / 100 x

Months: / 12 x

% Fringe: / 100 +

\$ Fringe: x (% FTE / 100)

Total Fringe: 315

Line Item Total is calculated and updated

\$0 of 317 OPS funds allocated to this line item

Adjust salary for cost of living.
Set % FTE to 100 because he is a Full-Time employee.

[View Next Allocation](#)

Note: At this point, the system knows the line item is there but not fully allocated. The Budget Discrepancy is created.

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View Discrepancies

ERROR	1 allocation(s) are not fully linked to the Workplan for 317 OPS / Personnel
ERROR	64 unfunded Objective(s)
ERROR	1 Line items in FA-Personnel are not fully allocated / balanced.
WARNING	Underallocated by \$5,000,000 for 317 OPS
WARNING	Underallocated by \$7,500 for 317 FA Vaccine

* Discrepancies marked 'ERROR' must be cleared prior to submission. [Click on 'ERROR' or 'WARNING' for more information.]

- Indicate the 317 OPS amount to be allocated to the line item in “\$ this Funding” field.

For this example, Pete will be paid only with 317 OPS funds. Therefore, the total amount is placed in the “\$ this Funding”. Notice the “Unallocated” reduced to \$0.

Total Allocated: \$1215 of 317 OPS for Personnel

Remaining Amount of 317 OPS available

The Remaining includes **ALL** Budget Categories. Therefore, if \$100,000 was allocated to 317 OPS/Travel, this amount would show as \$4,898,785.

317 OPS / FA Personnel

Total Allocated: \$1,215

317 OPS Target: \$5,000,000

Remaining: \$4,998,785

Total	(Salary + Fringe)	Unallocated \$	\$ this Funding
\$1,215		\$0	1215 Delete

Unallocated adjusts by amount allocated. Green will display after initial full allocation.

Enter the amount of 317 OPS funds to allocate.

The Budget Summary is now updated with the allocated amount. (See next page)

Application 2012 User Guide for eGrATIS

Application											
										Due in: 74 days	Budget Year: 2011
Home > Application > Budget Summary											
Select Budget View: <input checked="" type="radio"/> Annualized <input type="radio"/> Funded											
Budget Category	317 OPS	317 FA Vaccine	VFC OPS	VFC Ordering	VFC AFIX	Pan Flu	IIS Sentinel Sites	Enhanced Perinatal Hep. B	EOO	State Funds	Total
Funding											
Planning Ceiling	\$5,000,000	\$7,500	\$500,000	\$100,000	\$250,000	\$150,000	\$50,000	\$95,000	\$60,000	N/A	\$6,212,500
Unallocated Funds	\$4,998,785	\$7,500	\$500,000	\$100,000	\$250,000	\$150,000	\$50,000	\$95,000	\$60,000	N/A	\$6,211,285
Financial Assistance											
Personnel	\$900	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$900
Fringe	\$315	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$315
Travel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Equipment	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Supplies	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Contractual	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Vaccine	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Direct FA	\$1,215	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,215
Indirect	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total (Financial Assistance)	\$1,215	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,215
Direct Assistance											
Personnel	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total (Direct Assistance)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Grand Total	\$1,215	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,215

- **Tip:** If you over-allocated the amount of the line item, the system will display this in the "Unallocated \$" fields and provide the "not fully allocated / balanced" discrepancy.

Total (Salary + Fringe)	Unallocated \$	\$ this Funding	
\$1,215	(\$100)	1315	Delete

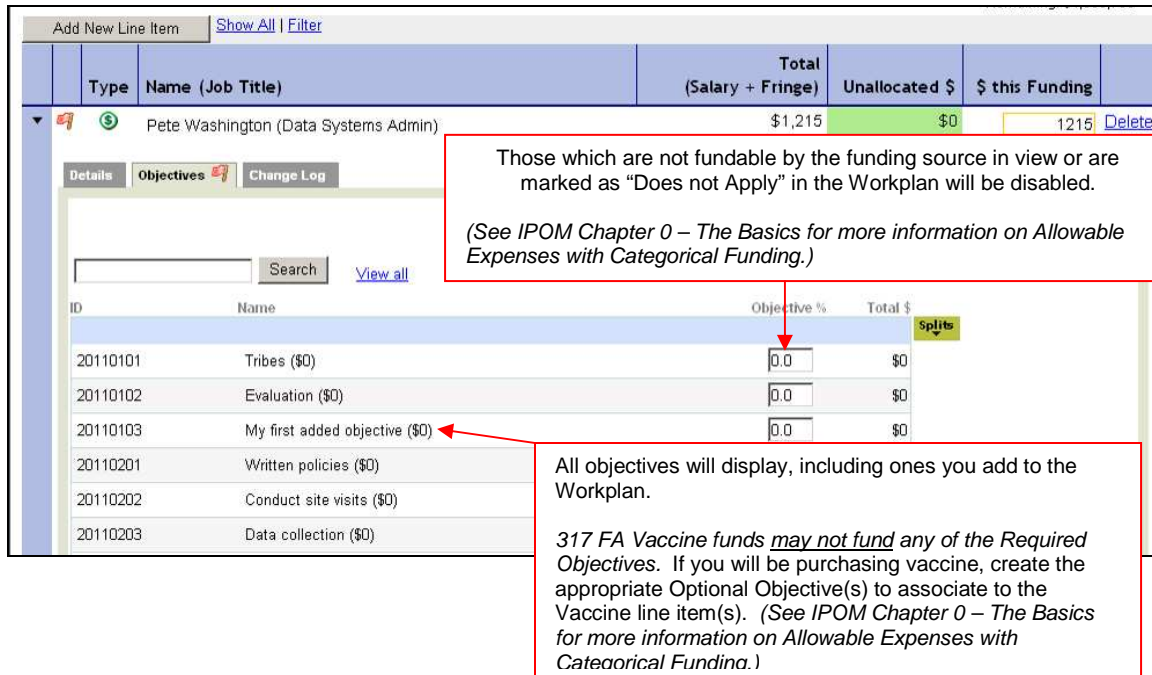
Line Item is over allocated by \$100

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- Select the **Objectives** tab to associate objectives to the line item on the Objectives tab.

Note: The total % distributed across one or more objectives must equal 100%.

Note: Only those objectives that can be funded by the funding source in view will allow data entry. (See *IPOM Chapter 0 – The Basics for more information on Allowable Expenses with Categorical Funding.*)



Those which are not fundable by the funding source in view or are marked as “Does not Apply” in the Workplan will be disabled.
(See *IPOM Chapter 0 – The Basics for more information on Allowable Expenses with Categorical Funding.*)

ID	Name	Objective %	Total \$
20110101	Tribes (\$0)	0.0	\$0
20110102	Evaluation (\$0)	0.0	\$0
20110103	My first added objective (\$0)	0.0	\$0
20110201	Written policies (\$0)		
20110202	Conduct site visits (\$0)		
20110203	Data collection (\$0)		

All objectives will display, including ones you add to the Workplan.
317 FA Vaccine funds may not fund any of the Required Objectives. If you will be purchasing vaccine, create the appropriate Optional Objective(s) to associate to the Vaccine line item(s). (See IPOM Chapter 0 – The Basics for more information on Allowable Expenses with Categorical Funding.)

- Enter the line item’s association to the objectives.

For example, Pete Washington will focus on “My first added objective” and “Data collection” at a 25/75 percent ratio.

➦ **Tip:** To view the total percent of the objective split, scroll to the bottom of the Objectives tab. There you will see the Objective % total and the Total \$ value. If the total is not 100%, in addition to the red flag on the Objectives tab, you will see an error message here.

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E. Add New Line Item

Note: If you choose to use the Indirect Cost Components on the Properties page, the system will generate your Indirect line items as you add and allocate funds. You also have the option to manually enter Indirect line items instead of having the system calculation them. IF so, when you enter your Indirect line item into the budget, enter the Total Requested amount based on that rate. Grantees should ensure that they are entering at least as much funding on the Indirect line item as is required by approved Indirect rate.

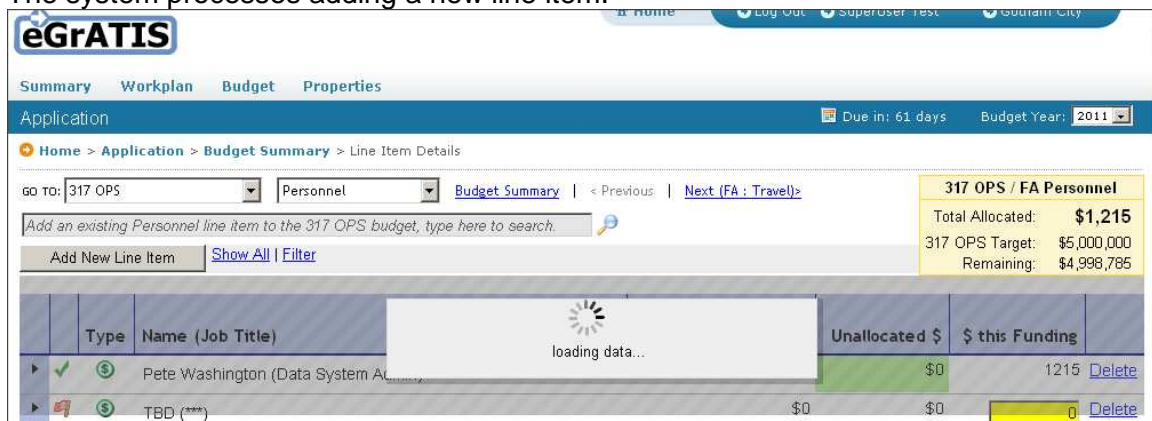
1. From the Budget Summary page, select the Funding Source/ Budget Category where you want to add a line item. For example, you want to add a Personnel line item into the 317 OPS funding source.

Budget Category	317 OPS	317 FA Vaccine	VEF OPS
Funding			
Planning Ceiling	\$5,000,000	\$7,500	\$500,000
Unallocated Funds	\$5,000,000	\$7,500	\$500,000
Financial Assistance			
Personnel	\$0	\$0	
Fringe	\$0	\$0	
Travel	\$0	\$0	

The **Application > Budget Summary > Line Item** Details page for 317 OPS/Personnel displays.

2. Add new allocation by selecting **Add New Line Item** button located at the top of the list of line items.

The system processes adding a new line item.



eGrATIS Summary Workplan Budget Properties

Application Due in: 61 days Budget Year: 2011

Home > Application > Budget Summary > Line Item Details

GO TO: 317 OPS Personnel Budget Summary | < Previous | Next (FA : Travel) >

Add an existing Personnel line item to the 317 OPS budget, type here to search.

Add New Line Item Show All | Filter

317 OPS / FA Personnel

Total Allocated: **\$1,215**

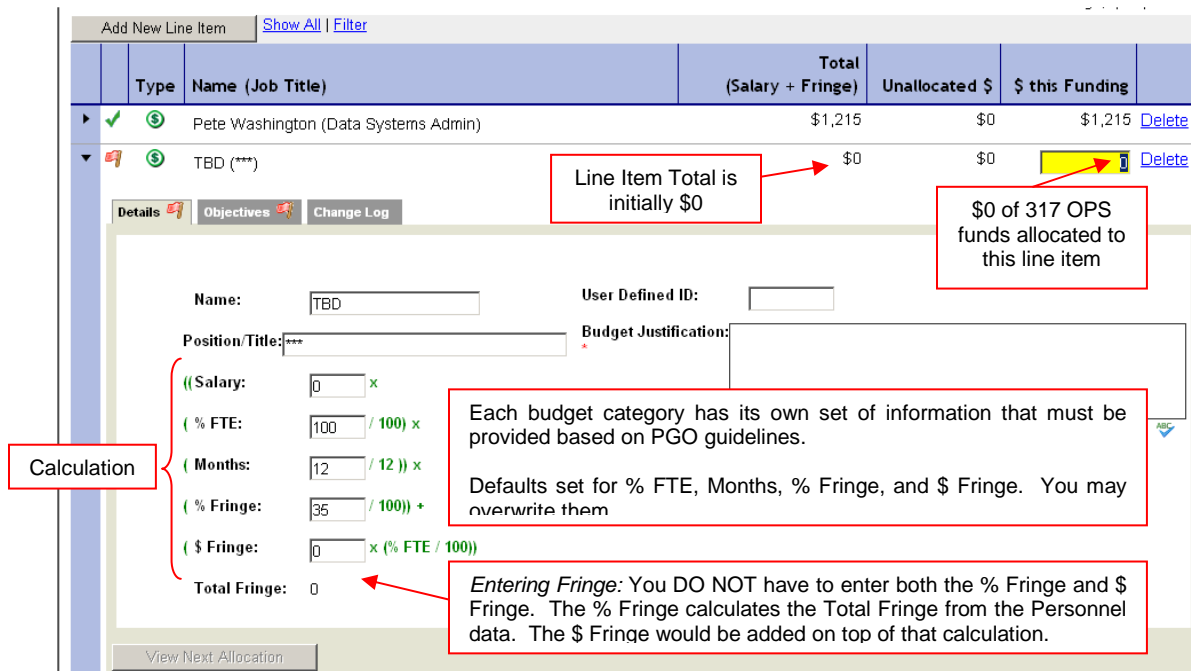
317 OPS Target: \$5,000,000

Remaining: \$4,998,785

Type	Name (Job Title)	Unallocated \$	\$ this Funding	
loading data...				
✓	Pete Washington (Data System A...	\$0	1215	Delete
✗	TBD (***)	\$0	0	Delete

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The system displays a new row at the bottom of the list.



Line Item Total is initially \$0

\$0 of 317 OPS funds allocated to this line item

Calculation

Each budget category has its own set of information that must be provided based on PGO guidelines. Defaults set for % FTE, Months, % Fringe, and \$ Fringe. You may overwrite them

Entering Fringe: You DO NOT have to enter both the % Fringe and \$ Fringe. The % Fringe calculates the Total Fringe from the Personnel data. The \$ Fringe would be added on top of that calculation.

Tip: The red flag indicates that there is information missing.

3. Enter information in the **Details** sub-tab for the allocation.

For this example, you have a new Public Health Medical Officer named John Doe. He is working on activities related to IPOM Chapter 6 (Adolescent Immunization) and IPOM Chapter 8 (Education, Information, Training, and Partnership).

a. Enter line item details. The system will calculate the line item total.

Each budget category has its own set of information that must be provided based on PGO guidelines. In this example, Personnel includes Position/Title, Name, Annual Salary, % FTE, Months, Fringe %, \$ Fringe. The Total Fringe and Line Item Total are calculated.

Tip: % FTE, Months, Fringe % and \$ Fringe are defaulted. You may overwrite the defaults for a line item by selecting the value in the row and entering the new value.

Tip: *Entering Fringe:* You DO NOT have to enter both the % Fringe and \$ Fringe. The % Fringe calculates the Total Fringe from the Personnel data. The \$ Fringe would be added on top of that calculation.

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- b. Optionally, enter your **User Defined ID**. This ID is an optional field grantees may use when cross-referencing individual allocations to budget data outside of eGrATIS (e.g., your local budgeting system).
- c. Enter the **Budget Justification** for the allocation.

Add New Line Item [Show All](#) | [Filter](#)

Type	Name (Job Title)	Total (Salary + Fringe)	Unallocated \$	\$ this Funding	
▶ ✓	Pete Washington (Data Systems Admin)	\$1,215	\$0	\$1,215	Delete
▼	John Doe (Public Health Medical Officer)	\$121,500	\$121,500	0	Delete

Details | Objectives | Change Log

Name: John Doe

Position/Title: Public Health Medical Officer

Salary: 90000 x

% FTE: 100 / 100 x

Months: 12 / 12 x

% Fringe: 35 / 100 +

\$ Fringe: 0 x (% FTE / 100)

Total Fringe: 31500

[View Next Allocation](#)

User Defined ID: GC-PHMO

Budget Justification: The budget justification for this position is entered here in this area.

(4024 characters remaining)

Flag clears from tab because info is entered.

Line Item Total is calculated and updated

4. Enter the amount to be allocated from this funding source in the “**\$ this Funding**” field.

For this example, John Doe is funded by 317 OPS and VFC OPS funds. \$80,300 will come from 317 OPS. The remainder, \$41,200 will come from VFC OPS.

Since we are viewing the 317 OPS/Personnel view, enter the \$80,300.

Application 2012 User Guide for eGrATIS

Total Allocated: Sum of two line items for 317 OPS/Personnel

Remaining Amount of 317 OPS available

The Remaining includes **ALL** Budget Categories. Therefore, if \$100,000 was allocated to 317 OPS/Travel, this amount would show as \$4,818,485.

317 OPS / FA Personnel

Total Allocated: **\$81,515**

317 OPS Target: \$5,000,000

Remaining: \$4,918,485

	Total (Salary + Fringe)	Unallocated \$	\$ this Funding	
	\$1,215	\$0	\$1,215	Delete
	\$121,500	\$41,200	80300	Delete

Unallocated adjusts by amount allocated.
There is \$41,200 still unallocated.

Enter the amount of 317
OPS funds to allocate.

5. Choose the **Objectives** tab. Enter information in the Objectives sub-tab.

For this example, John Doe is working on IPOM Chapter 6 (Adolescent Immunization) and IPOM Chapter 8 (Education, Information, Training, and Partnership).

Note: The system shows all objectives in the workplan. Only those that may used the funding source you are in will be enabled for a % distribution amount value. If the objective is grayed out, you cannot used the particular funding source to fund that objective.

Note: Also, if you create associations to the Objectives and more Workplan Objectives are added or removed later, you may have to adjust the associations per allocation.

To enter Objective % values, you have the following three options:

Option 1: Manually enter values under the Objective % column to the right of the Objective.

20110601	Increase teen coverage rates (\$8,030)	10.0	★	\$8,030
20110602	Juvenile facilities and social service agencies (\$32,120)	40.0	★	\$32,120
20110801	Staff orientation (\$24,090)	30.0	★	\$24,090
20110802	Clinical staff view Epi Course (\$16,060)	20.0	★	\$16,060
20110803	NCVIA (\$0)	0.0		\$0

OR

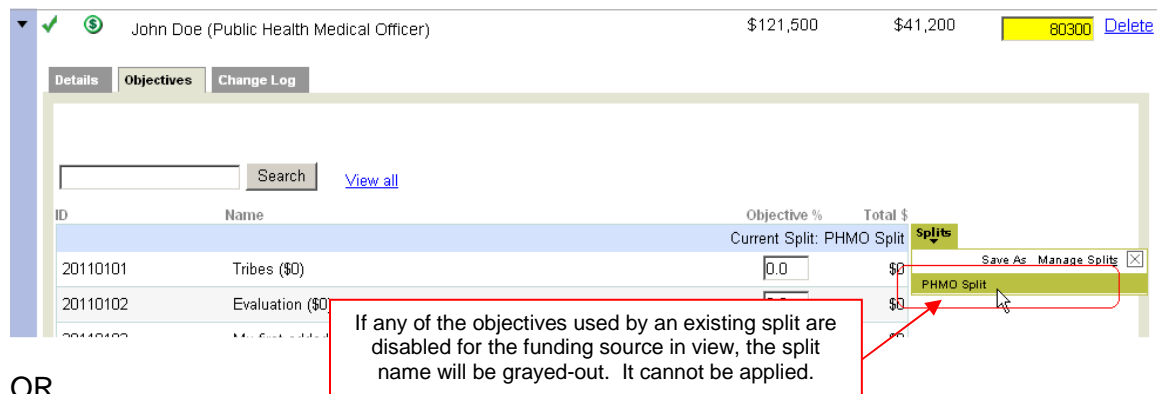
Application 2012 User Guide for eGrATIS

Option 2: Select a Split Set by utilizing the “Splits” menu.

To utilize the menu, move your mouse cursor over the “Splits” label (see area circled in red, below).

A drop-down menu will appear, showing a list of all previously saved splits available for this allocation.

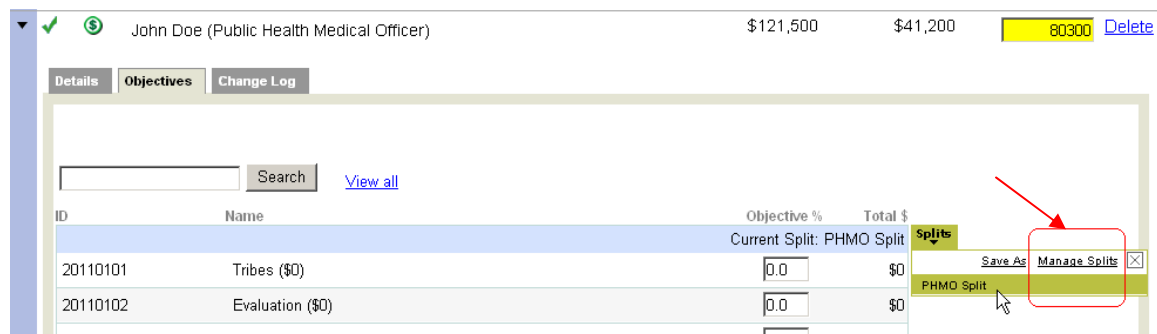
You may use the “Save As” to save the split you have entered. Or choose to select the name of an existing split you wish to apply to the allocation by clicking on it. The name of the split should now fill in above your % column, and the values for the saved split should populate your % fields.



If any of the objectives used by an existing split are disabled for the funding source in view, the split name will be grayed-out. It cannot be applied.

OR

Option 3: Create a Split Set by utilizing the “Splits” menu. Click on **Manage Splits**.



The menu below will appear.



See Appendix A for guidance on Managing Split Sets.

Application 2012 User Guide for eGrATIS

Notes:

- Split Sets are shared by all authorized users managing *your Grantee budget* within eGrATIS.
- If you change a % value after a Split Set has been applied to an allocation, an asterisk will display next to the Split Set name. The Split Set is no longer applied to that allocation. You may choose to save the new value set to this or a new Split Set.
- If no valid saved split sets exist, you may create them.
- For more information on the “Distribute Evenly” split set, see section

F. Copy Line Item to another Funding Source

You may copy an existing line item into the budget using functionality to search and copy in line items. You can search and copy in a line item from all budget categories except DA Personnel.

This is limited to a one-time copy into each funding source. For example, you copy Jane Smith (Admin Assistant) into VFC OPS Personnel. You cannot copy Jane Smith (Admin Assistant) into VFC OPS Personnel again. She already exists. You can copy Jane Smith into Personnel for other funding sources.

For our example, John Doe is a new Public Health Medical Officer working on activities related to IPOM Chapter 6 (Adolescent Immunization) and IPOM Chapter 8 (Education, Information, Training, and Partnership). He is funded by 317 OPS and VFC OPS funds, which support certain Chapter 6 and Chapter 8 activities. *(See IPOM Chapter 0 – The Basics for more information on Allowable Expenses with Categorical Funding.)*

John Doe was added as a new line item (see Section E above) in 317 OPS/Personnel. We will now copy him into the VFC OPS/Personnel line item list.

1. First go to the budget category and funding source line listing page for VFC OPS/Personnel.

You may do this from the Budget Summary page or if you are already looking at line items, change to the appropriate Funding Source and Budget Category using the top left drop downs.

2. Begin to type the name or title of the personnel line item. For our example, enter “John”

The system provides a list of possible matches.

Application 2012 User Guide for eGrATIS

GO TO: VFC OPS Personnel Budget Summary < Previous

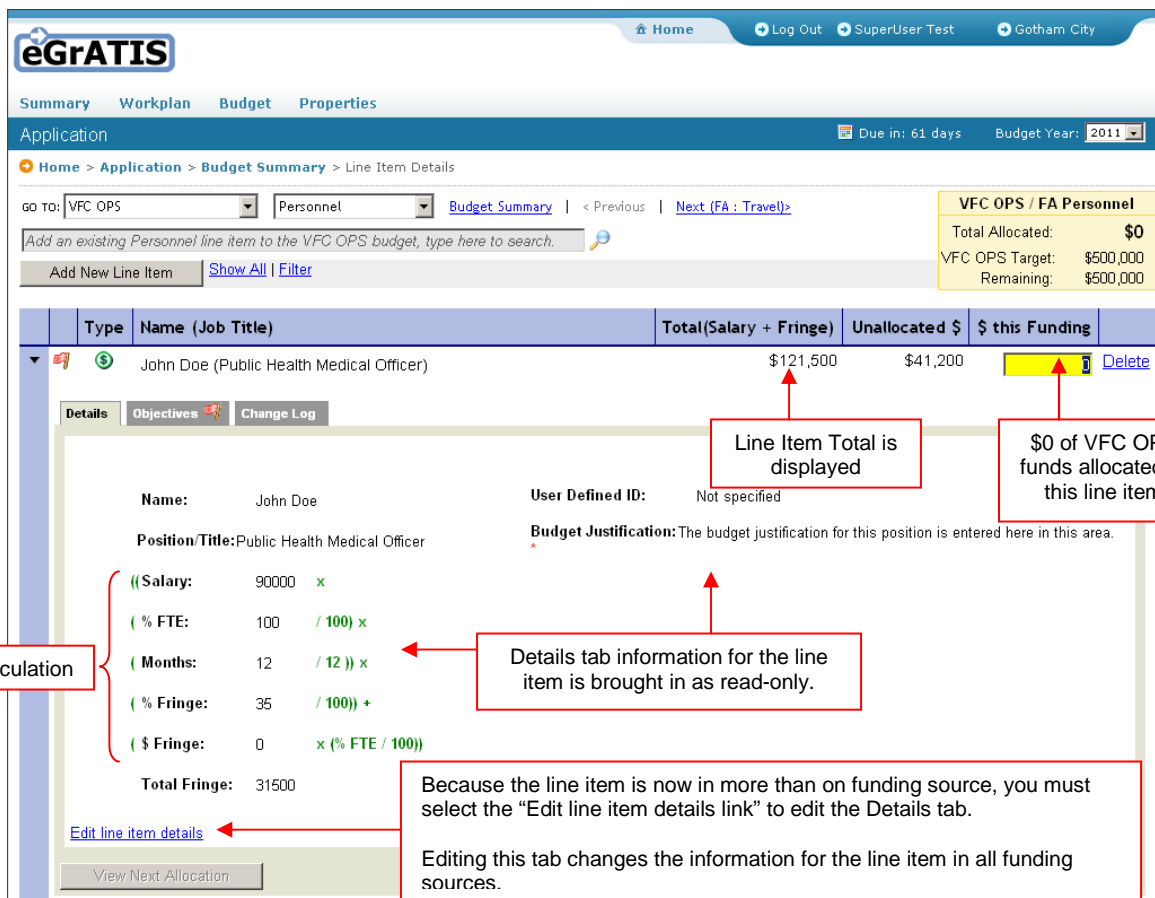
John

John Doe (Public Health Medical Officer)

Type Name (Job Title)

3. Select the match.

The system loads the line item into the listing.



eGrATIS Home Log Out SuperUser Test Gotham City

Summary Workplan Budget Properties

Application Due in: 61 days Budget Year: 2011

Home > Application > Budget Summary > Line Item Details

GO TO: VFC OPS Personnel Budget Summary < Previous Next (FA : Travel)

Add an existing Personnel line item to the VFC OPS budget, type here to search.

Add New Line Item Show All Filter

Type	Name (Job Title)	Total(Salary + Fringe)	Unallocated \$	\$ this Funding	
	John Doe (Public Health Medical Officer)	\$121,500	\$41,200		Delete

VFC OPS / FA Personnel

Total Allocated:	\$0
VFC OPS Target:	\$500,000
Remaining:	\$500,000

Details Objectives Change Log

Name: John Doe User Defined ID: Not specified

Position/Title: Public Health Medical Officer Budget Justification: The budget justification for this position is entered here in this area.

Calculation

((Salary:	90000	x
(% FTE:	100	/ 100) x
(Months:	12	/ 12) x
(% Fringe:	35	/ 100) +
(\$ Fringe:	0	x (% FTE / 100))
Total Fringe:	31500	

Edit line item details View Next Allocation

Line Item Total is displayed

\$0 of VFC OPS funds allocated to this line item

Details tab information for the line item is brought in as read-only.

Because the line item is now in more than one funding source, you must select the "Edit line item details link" to edit the Details tab.

Editing this tab changes the information for the line item in all funding sources.

To complete the line item:

- Indicate the VFC OPS amount to be allocated to the line item.
For this example, the remainder of the line item (i.e., Unallocated \$) will be funded by VFC OPS.

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Total Allocated: Sum of two line items for VFC OPS/Personnel

Remaining Amount of VFC OPS available
The Remaining includes **ALL** Budget Categories. Therefore, if \$100,000 was allocated to VFC OPS/Travel, this amount would show as \$358,800.

VFC OPS / FA Personnel	
Total Allocated:	\$41,200
VFC OPS Target:	\$500,000
Remaining:	\$458,800

Total(Salary + Fringe)	Unallocated \$	\$ this Funding
\$121,500	\$0	41200 Delete

Unallocated adjusts by amount allocated. Green will display after initial full allocation.

Enter the amount of VFC OPS funds to allocate.

User Defined ID: Not specified

5. Select the **Objectives** tab.

Add New Line Item [Show All](#) [Filter](#)

Type	Name (Job Title)	Total (Salary + Fringe)	Unallocated \$	\$ this Funding
John Doe (Public Health Medical Officer)		\$121,500	\$0	41200 Delete

Details **Objectives** [Change Log](#)

Search [View all](#)

ID	Name	Total (Salary + Fringe)	Unallocated \$
20110101	Tribes (\$0)		
20110102	Evaluation (\$0)		
20110103	My first added objective (\$304)		
20110201	Written policies (\$0)		
20110202	Conduct site visits (\$0)	0.0	\$0
20110203	Data collection (\$911)	0.0	\$0
20110204	VFC-eligible population (\$0)	0.0	\$0
20110205	Storage and handling (\$0)	0.0	\$0
20110206	Federal excise tax (\$0)	0.0	\$0
20110301	Percent of children in IIS (\$0)	0.0	\$0
20110302	Percentage of adolescents in IIS (\$0)	0.0	\$0
20110303	Provider participation (\$0)	0.0	\$0
20110304	Evaluate provider participation (\$0)		
20110305	Assess coverage (\$0)		
20110306	National data queries (\$0)		
20110307	Functional standards (\$0)		

All objectives will display, including ones you add to the Workplan.

317 FA Vaccine funds may not fund any of the Required Objectives. If you will be purchasing vaccine, create the appropriate Optional Objective(s) to associate to the Vaccine line item(s). (See IPOM Chapter 0 – The Basics for more information on Allowable Expenses with Categorical Funding.)

Those which are not fundable by the funding source in view or are marked as “Does not Apply” in the Workplan will be disabled.

(See IPOM Chapter 0 – The Basics for more information on Allowable Expenses with Categorical Funding.)

6. Associate objectives to the line item on the Objectives tab.

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To enter Objective % values, you may do one the following three options:

Option 1: Manually enter values under the Objective % column to the right of the Objective.

20110601	Increase teen coverage rates (\$40,990)	80.0	\$32,960
20110602	Juvenile facilities and social service agencies (\$32,120)	0.0	\$0
20110801	Staff orientation (\$24,090)	0.0	\$0

OR

Option 2: Select a Split Set by utilizing the “Splits” menu.

To utilize the menu, move your mouse cursor over the “Splits” label.

A drop-down menu will appear, showing a list of all previously saved splits available for this allocation.

You may use the “Save As” to save the split you have entered in Option 1 or choose to select the name of an existing split you wish to apply to the allocation by clicking on it. The name of the split will fill in above the % column, and the values for the saved split will populate the % fields.

Add New Line Item
[Show All](#) | [Filter](#)

Type	Name (Job Title)	Total (Salary + Fringe)	Unallocated \$	\$ this Funding
✓	John Doe (Public Health Medical Officer)	\$121,500	\$0	41200 Delete

Details
Objectives
Change Log

[View all](#)

ID	Name	Objective %	Total \$
20110101	Tribes (\$0)	0.0	\$0
20110102	Evaluation (\$0)	0.0	\$0

Splits
Save As
Manage Splits

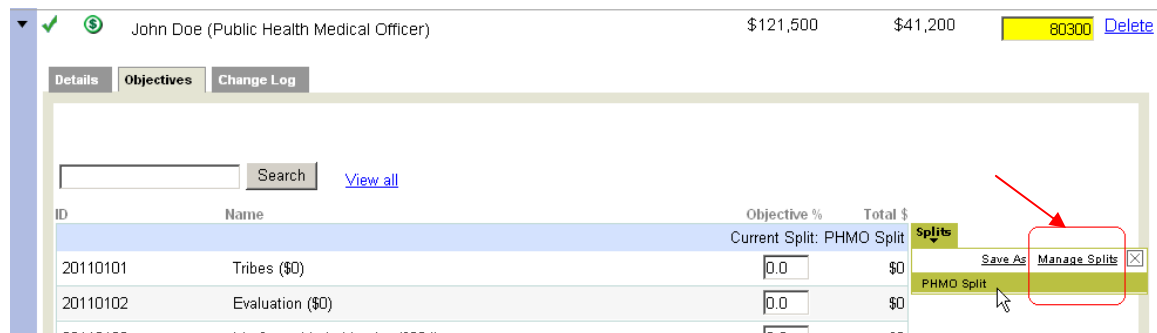
PHMO Split

If any of the objectives used by an existing split are disabled for the funding source in view, the split name will be grayed-out. It cannot be applied.

OR

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Option 3: Create a Split Set by utilizing the “Splits” menu. Click on **Manage Splits**.



ID	Name	Objective %	Total \$
20110101	Tribes (\$0)	0.0	\$0
20110102	Evaluation (\$0)	0.0	\$0

The menu below will appear.



ID	Name	Objective
----	------	-----------

See Appendix A for guidance on Managing Split Sets.

Notes:

- Split Sets are shared by all authorized users managing *your Grantee budget* within eGrATIS.
- If you change a % value after a Split Set has been applied to an allocation, an asterisk will display next to the Split Set name. The Split Set is no longer applied to that allocation. You may choose to save the new value set to this or a new Split Set.
- If no valid saved split sets exist, you may create them.
- For more information on the “Distribute Evenly” split set, see section

G. Edit Line Item and Allocation Details

A line item may be allocated to multiple funding sources. There is certain information that is at the *line item level versus the allocation level*.

Line Item Level Data:

Line item information includes the information on the Line Item Details tab. This information is the same for each line item shown in each funding source to which it is allocated.

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Allocation Level Data:

The allocation for the line item is the amount allocated and how that amount is associated or budgeted to the Workplan Objectives. These may be different for each line item shown in each funding source to which it is allocated.

Because the line item information is the same across each funding source to which it is allocated, if you change the information in one funding source it will change it in all others. However, changes to the amount allocated and the association to the Workplan Objectives does not affect the amount allocated or workplan associations for this line item in other funding sources.

Edit Line Item Details (Line Item Funded by ONE Funding Source)

1. Select an existing line item.
2. Select the value on the Details tab to be changed. (Details tab is editable.)
3. Edit the data.

Edit Line Item Details (Line Item Funded by MULTIPLE Funding Source)

1. Select an existing line item.
2. If the line item is allocated to more than one funding source, you will see a link “Edit this Line Item”. If so, click the link.

Type	Name (Job Title)	Total (Salary + Fringe)	Unallocated \$	\$ this Funding	
✓	John Doe (Public Health Medical Officer)	\$121,500	\$0	41200	Delete

Details
Objectives
Change Log

Name: John Doe **User Defined ID:** GC-PHMO

Position/Title: Public Health Medical Officer **Budget Justification:** The budget justification for this position is entered here in this area.

Salary: 90000 x

% FTE: 100 / 100 x

Months: 12 / 12 x

% Fringe: 35 / 100 +

\$ Fringe: 0 x (% FTE / 100)

Total Fringe: 31500

[Edit line item details](#)

[View Next Allocation](#)

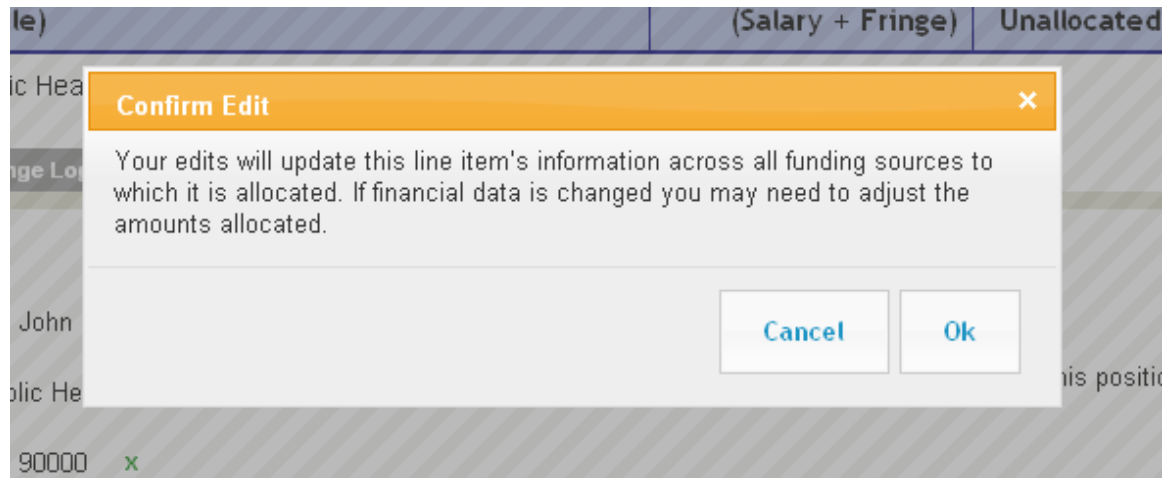
Because the line item is in more than on funding source, you must select the “Edit line item details link” to edit the Details tab.

Editing this tab changes the information for the line item in all funding sources.

3. Select the “**Edit this Line Item**” link.

Application 2012 User Guide for eGrATIS

The system requests confirmation since this will affect this line item in other funding sources.



4. Select **OK** to the message.

Type	Name (Job Title)	Total (Salary + Fringe)	Unallocated \$	\$ this Funding	
✓	John Doe (Public Health Medical Officer)	\$121,500	\$0	41200	Delete

Details | Objectives | Change Log

Name: John Doe **User Defined ID:** GC-PHMO

Position/Title: Public Health Medical Officer **Budget Justification:** The budget justification for this position is entered here in this area.

((Salary: 90000 x

(% FTE: 100 / 100) x

(Months: 12 / 12) x

(% Fringe: 35 / 100) +

(\$ Fringe: 0 x (% FTE / 100))

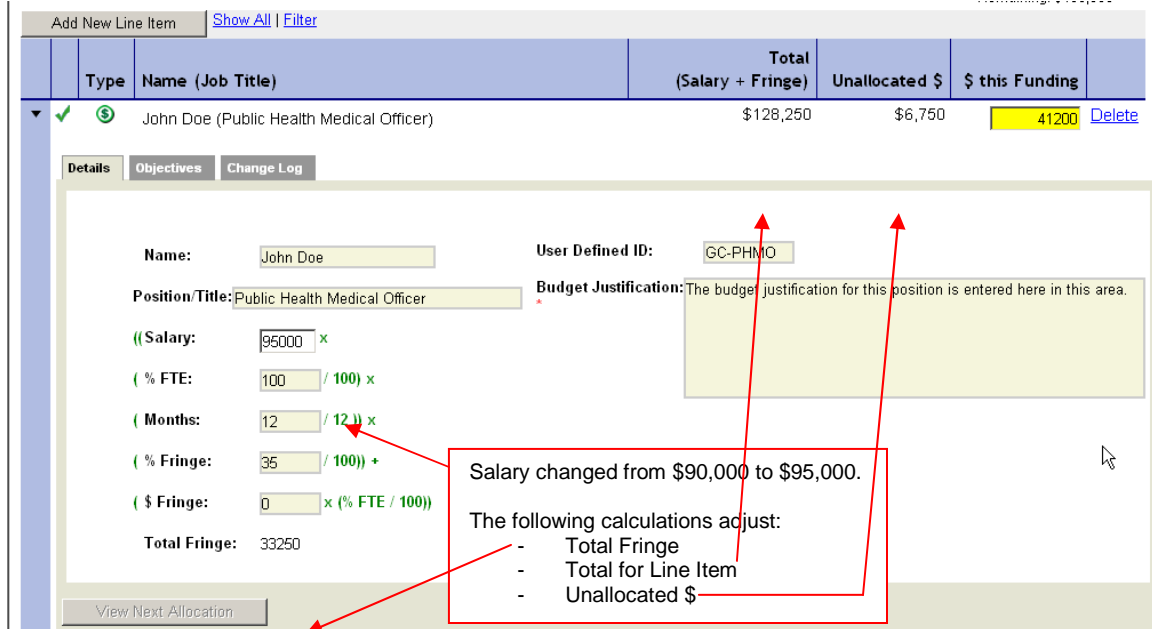
Total Fringe: 31500

[View Next Allocation](#)

5. Click on the value on the Details tab to be changed.

For this example, I need to adjust the Salary from \$90,000 to \$95,000.

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Type	Name (Job Title)	Total (Salary + Fringe)	Unallocated \$	\$ this Funding
✓	John Doe (Public Health Medical Officer)	\$128,250	\$6,750	41200

Details | Objectives | Change Log

Name: John Doe User Defined ID: GC-PHMO

Position/Title: Public Health Medical Officer Budget Justification: The budget justification for this position is entered here in this area.

((Salary: 95000 x
 (% FTE: 100 / 100) x
 (Months: 12 / 12)) x
 (% Fringe: 35 / 100) +
 (\$ Fringe: 0 x (% FTE / 100))
 Total Fringe: 33250

Salary changed from \$90,000 to \$95,000.

The following calculations adjust:

- Total Fringe
- Total for Line Item
- Unallocated \$

View Next Allocation

Edit Allocation Details: Amount

There may be several reasons to change allocation details. Perhaps changing the line item details changed the line items total amount. Or you may just want to adjust the amount allocated from the funding sources.

There are two ways to update allocated amounts.

1. Go to the specific line item in the budget category/funding source and change the “**\$ this Funding**” value directly.

OR

2. Use the **line item Funding Breakout**. You will only see the breakout if the line item is funded by more than one funding source.

For this example, I will increase the 317 OPS amount by the Unallocated amount of \$6,750.

- a. Place your cursor over the white space of the line item description. For Personnel, this is the “Name (Job Title)” column. You will see an icon of a piece of paper.

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Add New Line Item		Show All Filter		Funding Breakout Icon	
	Type	Name (Job Title)	Total (Salary + Fringe)		
▼	✓	John Doe (Public Health Medical Officer)	\$128,250		

- b. Select the **Funding Breakout icon** on the line item. The system displays the Funding Breakout.

You are looking at VFC OPS/Personnel line items

GO TO: VFC OPS Personnel [Budget Summary](#) | < Previous | Next (FA : Travel) > Total Allocated: **\$41,200**
Target \$500,000
Remaining: \$458,800

Add an existing Personnel line item to the VFC OPS budget, type here to search.

Add New Line Item		Show All Filter		Select the Funding Breakout Icon	
	Type	Name (Job Title)	Total (Salary + Fringe)	Unallocated \$	\$ this Funding
▶	✓	John Doe (Public Health Medical Officer)	\$128,250	\$6,750	\$41,200 Delete

Funding Breakout

Funding Source	\$ Amount
317 OPS	\$80,300
VFC OPS	\$41,200

- c. Place your cursor over the amount you want to change.

Note: For the funding source in view, you must edit that allocated amount using the “\$ this Funding” field. The Funding Breakout is used to edit amounts allocated for other funding sources. Therefore, since we are looking at the VFC OPS/Personnel, the Funding Breakout can be used to edit the 317 OPS value.

	Total (Salary + Fringe)	Unallocated \$	\$ this Funding
	\$128,250	\$6,750	\$41,200

Funding Breakout

Funding Source	\$ Amount
317 OPS	\$80,300
VFC OPS	\$41,200

Select the Pencil Icon to edit 317 OPS amount

- d. Click the **Pencil icon**. The \$ Amount becomes editable in the Funding Breakout.

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	Total (Salary + Fringe)	Unallocated \$	\$ this Funding
	\$128,250	\$6,750	\$41,200

Funding Breakout

Funding Source	\$ Amount
317 OPS	\$ 80300
VFC OPS	\$41,200

Change 317 OPS amount here

e. Change the **\$ Amount**.

For this example, I will increase the 317 OPS amount by the Unallocated amount of \$6,750.

	Total (Salary + Fringe)	Unallocated \$	\$ this Funding
	\$128,250	\$6,750	\$41,200

Funding Breakout

Funding Source	\$ Amount
317 OPS	\$ 87050
VFC OPS	\$41,200

Amount changed

The system will adjust “Unallocated \$” amount and the “\$ this Funding” in the 317 OPS/Personnel.

	Total (Salary + Fringe)	Unallocated \$	\$ this Funding
	\$128,250	\$0	\$41,200

Funding Breakout

Funding Source	\$ Amount
317 OPS	\$ 87050
VFC OPS	\$41,200

Change saves; Unallocated \$ adjusts

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Note: In this example, there are only two funding sources. If there were more, you could change other amounts too.

Switch to Line Item in Other Funding Source:

Switch to the same line item in another funding source by selecting the Funding Source link in the Funding Breakout.

	Total (Salary + Fringe)	Unallocated \$	\$ this Funding
	\$128,250	\$0	\$41,200

Funding Breakout	
Funding Source	\$ Amount
317 OPS ← Select the active funding source link.	\$ 87050
VFC OPS	\$41,200

The line item for John Doe will open in the 317 OPS/Personnel view.

Add New Line Item

Show All | Filter

Type	Name (Job Title)	Total (Salary + Fringe)	Unallocated \$	\$ this Funding	
▶ ✓ 💰	Pete Washington (Data Systems Admin)	\$1,215	\$0	\$1,215	Delete
▼ ✓ 💰	John Doe (Public Health Medical Officer)	\$128,250	\$0	87050	Delete

Details

Objectives

Change Log

Name:

John Doe

User Defined ID:

GC-PHMO

Position/Title:

Public Health Medical Officer

Budget Justification:

The budget justification for this position is entered here in this area.

((Salary:

95000

x

(% FTE:

100

/ 100)

x

(Months:

12

/ 12))

x

(% Fringe:

35

/ 100))

+

(\$ Fringe:

0

x (% FTE / 100))

Total Fringe:

33250

[Edit line item details](#)

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Edit Allocation Details: Workplan Objective Associations

1. On the line item, select the Objectives tab and make edits.

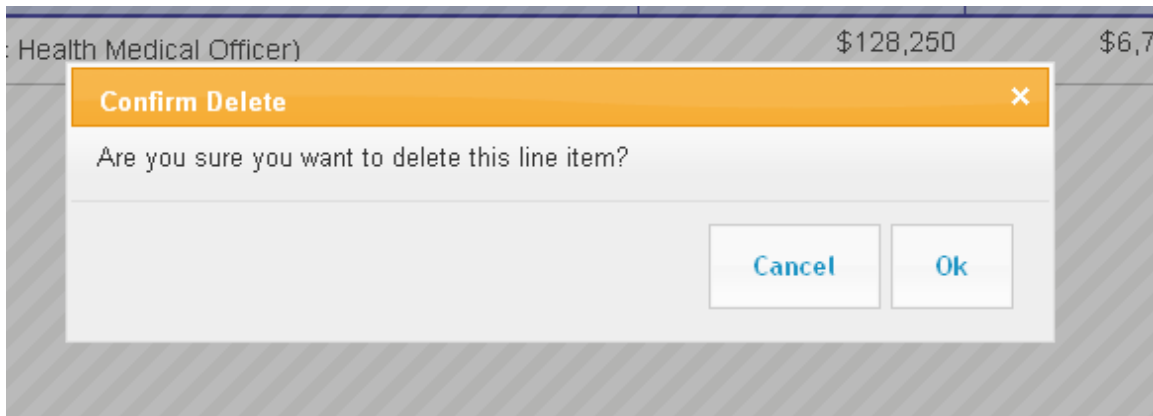
H. Delete Line Item

If a line item is allocated to more than one funding source, you must **delete EACH allocation** from each funding source.

1. To delete an allocation, select the Delete link for that allocation.

Add New Line Item		Show All Filter				
	Type	Name (Job Title)	Total (Salary + Fringe)	Unallocated \$	\$ this Funding	
▶	✓	John Doe (Public Health Medical Officer)	\$128,250	\$6,750	\$41,200	Delete

2. The system will prompt you to confirm deletion of the selected row.



3. Confirm deletion by selecting **OK** to the prompt.

Note: IMPORTANT - The system removes the line item in this funding source, not in other funding sources.

4. If the line item was allocated to another funding source, go to that funding source (e.g., change the funding source dropdown)
5. **Repeat steps 1 – 4** until all allocations for the line item are deleted.

X. Complete Data Collection Tool Forms

Data Collection Tool forms are new to eGrATIS this year. These are survey forms that will ask you to select an answer and/or enter information. All questions must be answered to be considered completed. The four forms are:

- IIS Business Plan
- VFC and AFIX Site Visit Tables (*Not applicable if you do not receive these funds*)

Data Collection Tools

Progress of 100% means all questions are answered. This percentage dynamically calculates.

Data Collection Tool	Progress
VFC/AFIX Site Visit Table for Gotham City	0%
IIS Business Plan Data Entry for Gotham City	0%

1. From the **Application > Summary** page, determine which form you want to open.

2. Select the link for the form you wish to answer. (e.g., IIS Business Plan)

If the form has more than one logical grouping, you will be taken to a list of categories on the summary page. If not, you will be taken directly to the questions and may skip to step 4.

3. Select the category link you wish to answer. (You may answer them out of order or start with the first one and move through each category.)

4. Respond to each question by selecting an answer or entering text. You may copy and paste text into the comment boxes.

➔ **Tip:** If copy/pasting text into the fields, note that line breaks and simple bullets (i.e., dashes and dots) will be preserved. Bold, italics, underlines, etc. will not be preserved.

5. Choose a Save option at the bottom of the screen to save your answers. ***If you leave the page without saving, your data will be lost.***

- “Save & Previous” saves your answers and goes to the previous category
- “Save & Next” saves your answers and goes to the next category.
- “Save & Exit” saves your answers and returns you to the list of Categories for the form. The progress bar displays the percentage of questions which contain answers. The progress bar for all categories of the form must be at 100% in order to be considered complete.













➔ **Tip:** “Cancel & Exit” will take you out of the questions to the list of categories. The information you had entered on that page will not be saved.

XI. Print/Save Application Reports

The following application standard reports are provided:

- **Budget Justification Report:** A list of all line items grouped by budget category. Each line item shows its budget justification, financial make-up (e.g., 10 units at \$25 each), total amount requested and the breakout across the funding sources. A budget summary table broken out by funding source and object class is included.
- **Workplan Detail Report:** A list of all Workplan Objectives. **Project Narrative.** For each Objective, indicates the budgeted amount, funding breakout, related activities, performance measure and which IPOM chapter the Objective supports. Includes all objectives, including those marked “does not apply”.
- **Programmatic Budget Report:** Displays a budget table of Financial Assistance funds broken down by budget category (a.k.a., object class) across the IPOM Components (a.k.a., Chapters). Subtotals and grand totals are provided.
- **Budget Summary:** Displays the budget by budget category (a.k.a., object class) and funding source. Subtotals and grand totals are provided.
- **Funding Source Component:** Displays the total amount budgeted per IPOM Component (a.k.a., Chapter) with breakout across funding sources.
- **Program Operations Line Listing:** Displays all line items (vertically) with breakout across the funding sources (horizontal). Line items are sorted by budget category.
- **Workplan Data:** Displays a list of objectives in your workplan. Additionally displays activities per each of your workplan objectives. Does not include any objectives marked as “does not apply”.
- **SF424A:** Section A and B are populated with budget data entered into eGrATIS. It provides the breakout by Grant funding sources as well as the Total of all grant funding sources.
- **IIS Registry Business Plan:** Includes the following three sections of information: IIS Business Plan data collection tool responses, Workplan objectives related to IIS, and the IIS portions of Budget line items. It provides a holistic view of the IIS Business Plan for the application.

1. Locate the Reports section on the **Application > Summary** page.

Reports				
Budget Justification				 PDF
Workplan Details				 PDF
Programmatic Budget	View Report	 Excel	 Word	
Budget Summary	View Report	 Excel	 Word	
Funding Source Component	View Report	 Excel	 Word	
Program Operations by Line Item	View Report	 Excel	 Word	
Workplan Data		 Excel		
SF424a				 PDF

2. Click link to open the report in the specified format.
 - View Report – Opens in another browser window.
 - Excel – Opens in Excel application.
 - Word – Opens in Word application.

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XII. Upload/Attach Document(s)

You may attach required and supporting documents from the Attachments section. The system allows you to attach more than one document per attachment type.


If you are a grantee with federally and/or state recognized tribes, eGrATIS will require attachment of Chapter 1, Tribes which corresponds to required objective for Tribes.

Attachments

Attachments can be uploaded after the workplan and budget are complete. If there are required attachments, those must be attached in order to submit.

Required

There are no required files attached.

Type	Name/Description
	Chapter 1, Tribes

If you are a grantee that does NOT have any federally and/or state recognized tribes, eGrATIS does not require any attachments.

Attachments

Attachments can be uploaded after the workplan and budget are complete. If there are required attachments, those must be attached in order to submit.

Note: The workplan and budget must be completed prior to attaching documents. If they are not complete you will see:

1. Locate the Attachments section on the Application Summary page.

Once the workplan and budget are complete, you will see a link:

[Add New Attachment](#)

2. Select the Add New Attachment link to attach files.

The system displays the fields required to upload a new file.

Attachments

[Add New Attachment](#)

i Required (and optional) attachments are listed below. Supported file types for attachments are: (xls, doc, pdf, ppt, mdb, mpp, vsd, txt, jpg and zip).

*Choose a file:

*Display Name:

*Select Type:

Description:

(1000 characters remaining)

[Reset](#)

3. **Choose a file** to upload by either using the Browse functionality or typing in the complete file path.

⚠ Important: The follow file types are supported: .doc, .pdf, .mpp, .vsd, .xls, .ppt, .txt, .mdb, .zip. eGrATIS does not support upload of Microsoft Office 2007 documents. Please save the document to earlier version (e.g., Microsoft Office 2003).
4. Enter a descriptive and clear **display name** for the file. This does not have to be the document name, but can be a name that is somewhat descriptive of the file content.
5. Select the appropriate attachment **type**.
 - Defaults to required attachment "Chapter 1, Tribes"
6. Enter a **description** for the attachment.

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7. Click on the “**Upload File**” button to attach the document.

When a file is attached, the system will indicate who attached the file, the description and date/time stamp.

It will also provide the ability to delete the file.

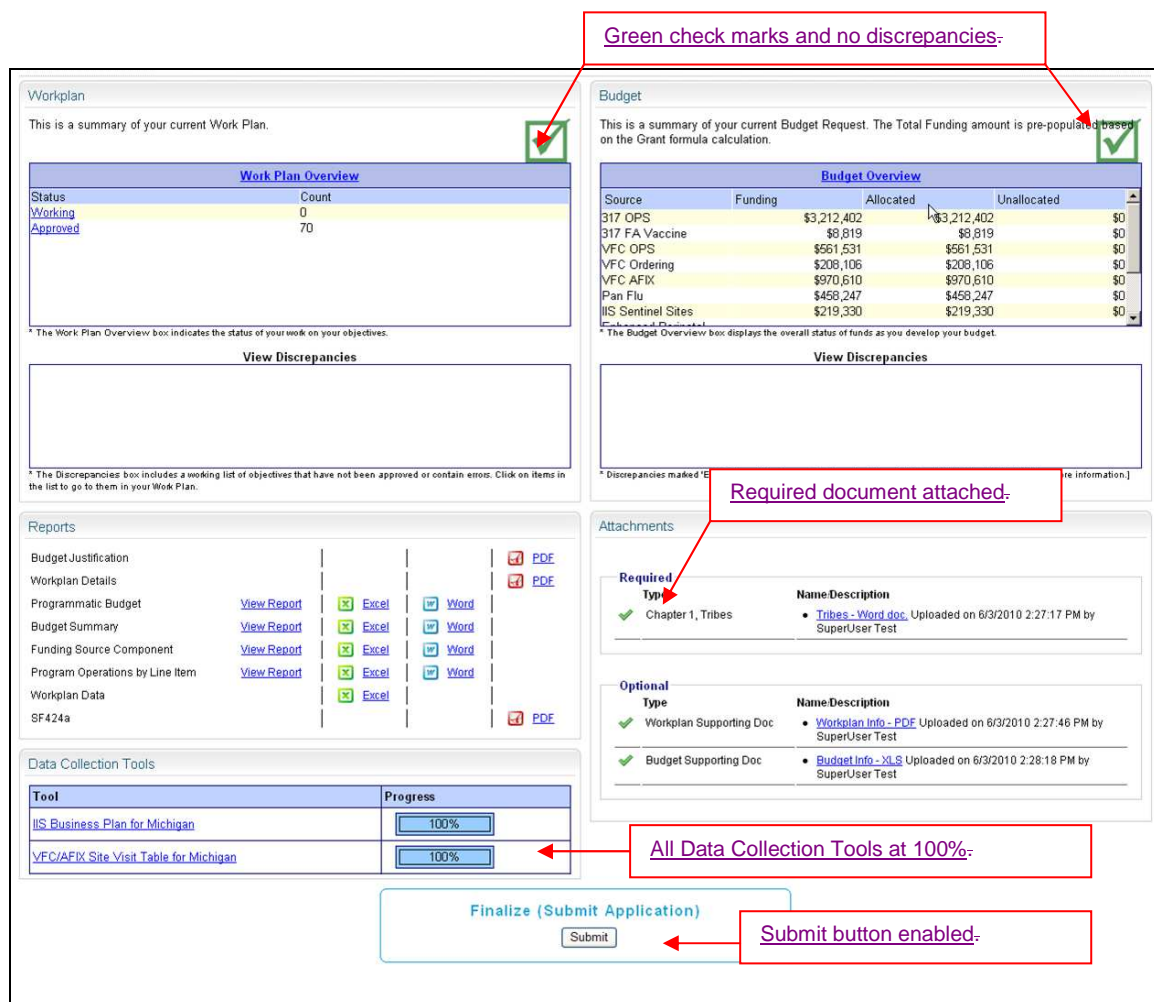
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XIII. Submit Application (Image)

The following must be completed before submitting:

- Workplan with no discrepancies
 - o A green checkmark will show in the Workplan section on the Summary page.
- Budget with no discrepancies
 - o A green checkmark will show in the Budget section on the Summary page.
- All Required attachments are uploaded
- All Data Collection Tools are completed (100% Progress)

Once all of this is complete, the submit button will be enabled.



Green check marks and no discrepancies:

Required document attached:

All Data Collection Tools at 100%:

Submit button enabled:

Finalize (Submit Application)

Submit

Workplan
This is a summary of your current Work Plan.

Work Plan Overview	
Status	Count
Working	0
Approved	70

Budget
This is a summary of your current Budget Request. The Total Funding amount is pre-populated based on the Grant formula calculation.

Budget Overview			
Source	Funding	Allocated	Unallocated
317 OPS	\$3,212,402	\$3,212,402	\$0
317 FA Vaccine	\$8,819	\$8,819	\$0
VFC OPS	\$561,531	\$561,531	\$0
VFC Ordering	\$208,106	\$208,106	\$0
VFC AFIX	\$970,610	\$970,610	\$0
Pan Flu	\$458,247	\$458,247	\$0
IIS Sentinel Sites	\$219,330	\$219,330	\$0

Reports

Report	View Report	Excel	Word	PDF
Budget Justification				
Workplan Details				
Programmatic Budget				
Budget Summary				
Funding Source Component				
Program Operations by Line Item				
Workplan Data				
SF424a				

Data Collection Tools

Tool	Progress
IIS Business Plan for Michigan	100%
VFC/AFIX Site Visit Table for Michigan	100%

Attachments

Required

Type	Name-Description
Chapter 1, Tribes	Tribes - Word doc, Uploaded on 6/3/2010 2:27:17 PM by SuperUser Test

Optional

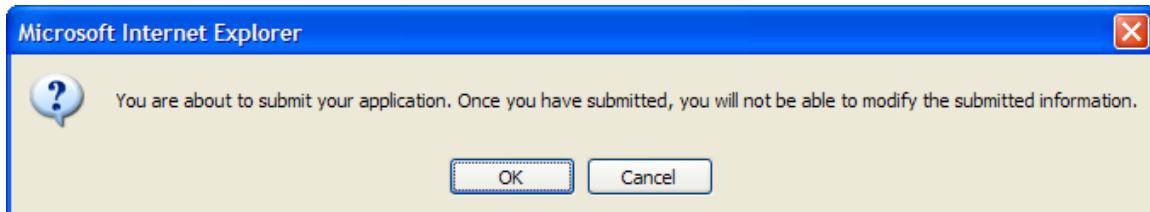
Type	Name-Description
Workplan Supporting Doc	Workplan Info - PDF Uploaded on 6/3/2010 2:27:46 PM by SuperUser Test
Budget Supporting Doc	Budget Info - XLS Uploaded on 6/3/2010 2:28:18 PM by SuperUser Test

Note: Only users with Super User role will see the submit button.

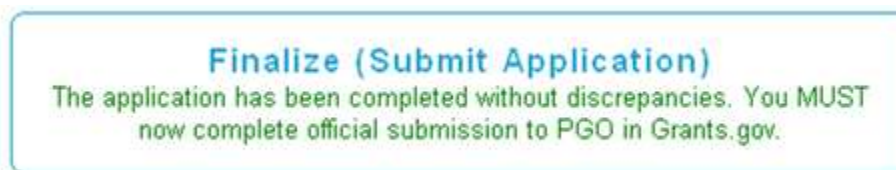
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Important: Before selecting the submit button verify all information is correct. Once the Application is submitted, you *cannot un-submit it*.

1. Select the Submit button



2. Select OK to the confirmation. (***You cannot un-submit.***) The Submit button is replaced with additional information.



You MUST now complete the official submission to PGO in Grants.gov.

For Grants.gov, you will use:

- The *Workplan Detail*, *Budget Justification* and *Budget Summary* reports generated from the Reports section of the eGrATIS Application Summary page. To ensure the data in these reports are final, generate and save these reports **after** selecting the submit button of Application in eGrATIS.

XIV. Assistance

A. Programmatic Assistance

Programmatic and eGrATIS system related questions should be directed to your Project Officer.

You may also submit questions/issues by email to egratissupport@cdc.gov. When writing to this general mailbox, also cc your Project Officer.

B. SDN Assistance

SDN Helpdesk points of contact may be reached at 1-800-532-9929, option 1.

Send emails to: phintech@cdc.gov.

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Appendix A: Managing Objective Split Sets (for Budget Allocations)

What are Split Sets?

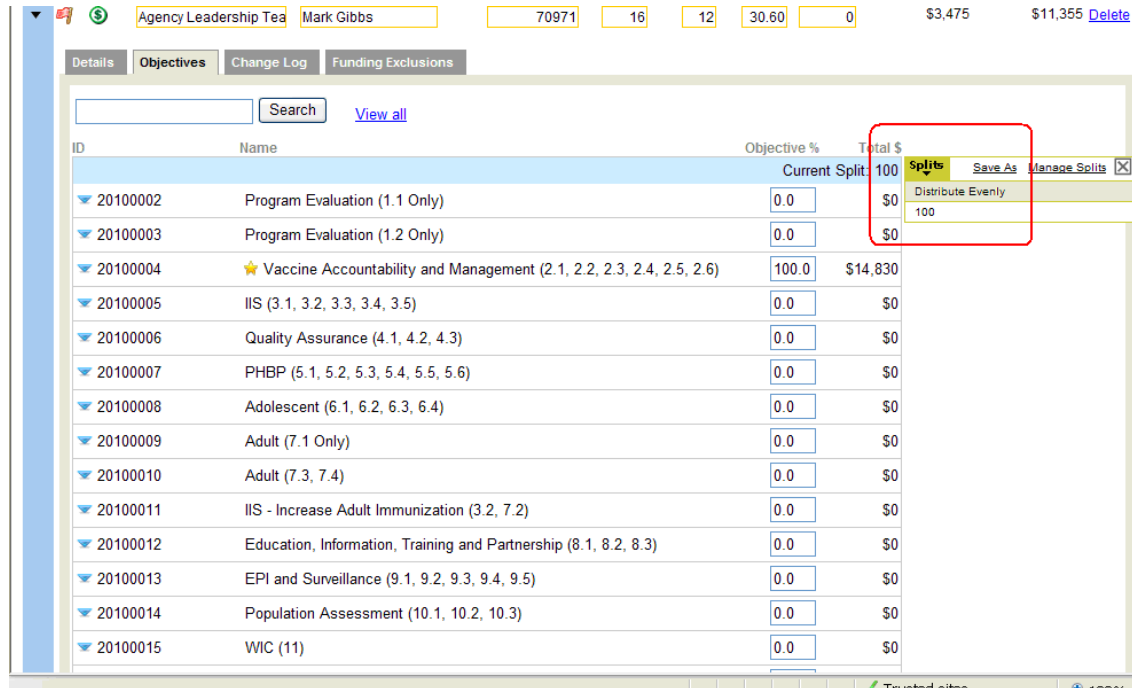
When a budget allocation is created, you are required to designate the % of dollars in the allocation that will be spent per Objective(s). For example, the allocation might request \$500. There are 25 Objectives. The amount may be split across the Objectives in various ways. For example, 20% allocated to 5 Objectives; 100% of the requested funds to be spent on one Objective.

Split Sets refers to the ability to save and re-use sets of allocation % splits across Objective(s).

Note: Split Sets are shared by all authorized users managing *your Grantee budget* within eGrATIS.

A. Load a Saved Split Set

- From the Objectives tab of a budget allocation, access the “Splits” menu. To utilize the menu, move your mouse cursor over the “Splits” label.



The screenshot shows the 'Objectives' tab of a budget allocation. At the top, there are fields for Agency Leadership Team (Mark Gibbs), ID (70971), and other details. Below this is a table of objectives with columns for ID, Name, Objective %, and Total \$. A red box highlights the 'Splits' dropdown menu, which is currently set to '100'. The dropdown menu shows options like 'Distribute Evenly' and '100'.

ID	Name	Objective %	Total \$
20100002	Program Evaluation (1.1 Only)	0.0	\$0
20100003	Program Evaluation (1.2 Only)	0.0	\$0
20100004	★ Vaccine Accountability and Management (2.1, 2.2, 2.3, 2.4, 2.5, 2.6)	100.0	\$14,830
20100005	IIS (3.1, 3.2, 3.3, 3.4, 3.5)	0.0	\$0
20100006	Quality Assurance (4.1, 4.2, 4.3)	0.0	\$0
20100007	PHBP (5.1, 5.2, 5.3, 5.4, 5.5, 5.6)	0.0	\$0
20100008	Adolescent (6.1, 6.2, 6.3, 6.4)	0.0	\$0
20100009	Adult (7.1 Only)	0.0	\$0
20100010	Adult (7.3, 7.4)	0.0	\$0
20100011	IIS - Increase Adult Immunization (3.2, 7.2)	0.0	\$0
20100012	Education, Information, Training and Partnership (8.1, 8.2, 8.3)	0.0	\$0
20100013	EPI and Surveillance (9.1, 9.2, 9.3, 9.4, 9.5)	0.0	\$0
20100014	Population Assessment (10.1, 10.2, 10.3)	0.0	\$0
20100015	WIC (11)	0.0	\$0

A drop-down menu will appear, showing a list of all previously saved splits available for this allocation.

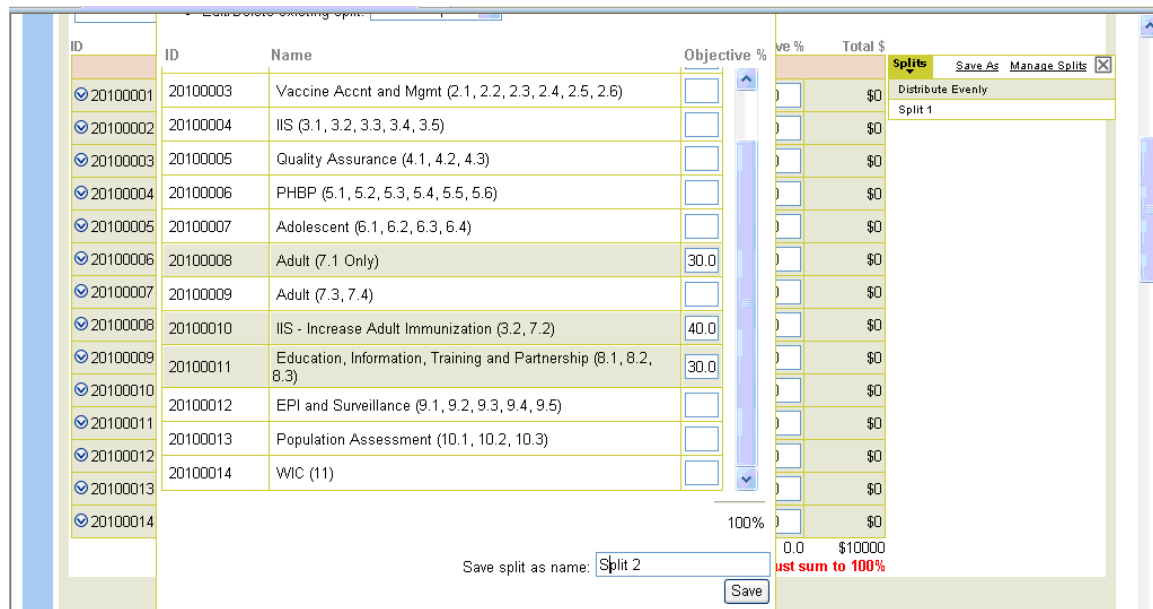
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B. Create a Saved Split Set from an Allocation

1. Manually enter desired Objective % values across Objectives (in the input fields to the right of each objective in the "Objective %" column).

Fill in with Objective % values summing to 100% and ready to save.

From the Objectives tab, select "Splits." A drop-down menu will appear. At the top right of the menu is the link "Save As". Select "Save As" from the menu. The "Save As" menu will appear, with a text field for the split name.



ID	ID	Name	Objective %	Total \$
20100001	20100003	Vaccine Acct and Mgmt (2.1, 2.2, 2.3, 2.4, 2.5, 2.6)		\$0
20100002	20100004	IIS (3.1, 3.2, 3.3, 3.4, 3.5)		\$0
20100003	20100005	Quality Assurance (4.1, 4.2, 4.3)		\$0
20100004	20100006	PHBP (5.1, 5.2, 5.3, 5.4, 5.5, 5.6)		\$0
20100005	20100007	Adolescent (6.1, 6.2, 6.3, 6.4)		\$0
20100006	20100008	Adult (7.1 Only)	30.0	\$0
20100007	20100009	Adult (7.3, 7.4)		\$0
20100008	20100010	IIS - Increase Adult Immunization (3.2, 7.2)	40.0	\$0
20100009	20100011	Education, Information, Training and Partnership (8.1, 8.2, 8.3)	30.0	\$0
20100010	20100012	EPI and Surveillance (9.1, 9.2, 9.3, 9.4, 9.5)		\$0
20100011	20100013	Population Assessment (10.1, 10.2, 10.3)		\$0
20100012	20100014	WIC (11)		\$0
20100013				\$0
20100014				\$0

Save split as name: Split 2

Save

0.0 \$10000 just sum to 100%

2. Type the desired name for the saved split set in the text field. The name must be unique.
3. Click on the "Save" button. The split set is saved and added to the list of split sets available to all authorized users managing *your budget* within eGrATIS (not to all eGrATIS users).

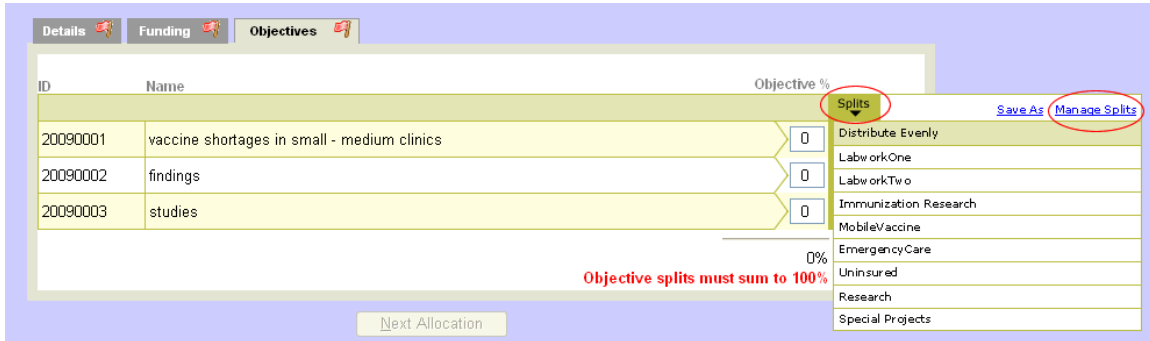
Note: If the set name you typed in is already used within your budget, the system will prompt you to either:

- a. cancel and type in a unique name, or to
- b. overwrite the existing split set of the same name with the new values you have entered.

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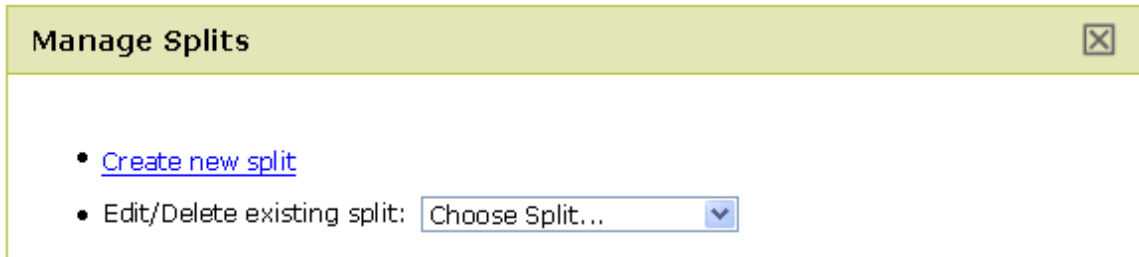
C. Create Split Sets using Manage Splits

- From the Objectives tab of a budget allocation, access the “Splits” menu. To utilize the menu, move your mouse cursor over the “Splits” label. A drop-down menu will appear with a “Manage Splits” link on the top right.



The screenshot shows the 'Objectives' tab in the eGrATIS application. It features a table with columns for ID, Name, and Objective %. The table contains three rows of objectives: 'vaccine shortages in small - medium clinics', 'findings', and 'studies'. To the right of the table, a 'Splits' dropdown menu is open, displaying a list of split types: 'Distribute Evenly', 'LabworkOne', 'LabworkTwo', 'Immunization Research', 'MobileVaccine', 'EmergencyCare', 'Uninsured', 'Research', and 'Special Projects'. The 'Manage Splits' link is circled in red in the top right corner of the dropdown menu. A red text message at the bottom of the table states 'Objective splits must sum to 100%'. A 'Next Allocation' button is located at the bottom center of the interface.

- Select the Manage Splits link. The pop-up window of the “Manage Splits” menu will appear:



The screenshot shows the 'Manage Splits' pop-up window. It has a title bar with the text 'Manage Splits' and a close button. The main content area contains two bulleted items: 'Create new split' with a link, and 'Edit/Delete existing split:' followed by a dropdown menu labeled 'Choose Split...'. The dropdown menu has a downward arrow icon.

- Select the “Create new split” link. The initial bulleted menu choices will remain at the top of the window, and a list of all objectives with their % value fields will appear beneath the menu. Depending on the number of objectives, the list will either be short with all objectives immediately visible, or longer with the ability to scroll through all objectives. Below is an example of an objectives list that requires scrolling (scrollbar is circled in red).

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Manage Splits: Create
✕

- [Create new split](#)
- Edit/Delete existing split: Choose Split...

ID	Name	Objective %
20090001	vaccine shortages in small - medium clinics	0
20090002	findings	0
20090003	studies	0
20090004	research	0
20090005	education	0
20090006	vaccines for uninsured families	0
20090007	objective seven	0
20090008	objective eight	0
20090009	objective nine	0
20090010	objective ten	0
20090011	objective eleven	0
20090012	objective twelve	0

0%

Objective splits must sum to 100%

Save split as name:

Save

4. Enter the appropriate Objective % values per Objective. The sum should equal 100%.

Note: While it is possible to save a split set that does not sum to 100%, it will cause discrepancy errors for any allocation the split set is applied to until it is edited to sum to 100%, so to avoid confusion it is recommended that split sets sum to 100% prior to saving.

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- Enter a Split Set name in the text field below the objectives listing (see below, circled in red).

Manage Splits: Create ✕

- [Create new split](#)
- Edit/Delete existing split: Choose Split... ▼

ID	Name	Objective %
20090001	vaccine shortages in small - medium clinics	60
20090002	findings	40
20090003	studies	0
20090004	research	0
20090005	education	0
20090006	vaccines for uninsured families	0
20090007	objective seven	0
20090008	objective eight	0
20090009	objective nine	0
20090010	objective ten	0
20090011	objective eleven	0
20090012	objective twelve	0

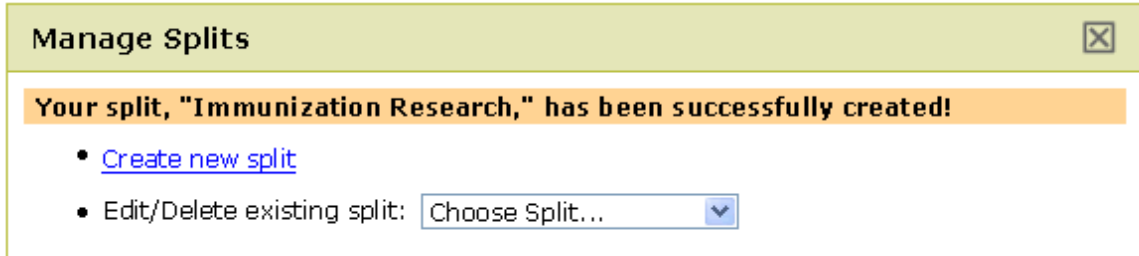
100%

Save split as name: Immunization Research

Save

Application 2012 User Guide for eGrATIS

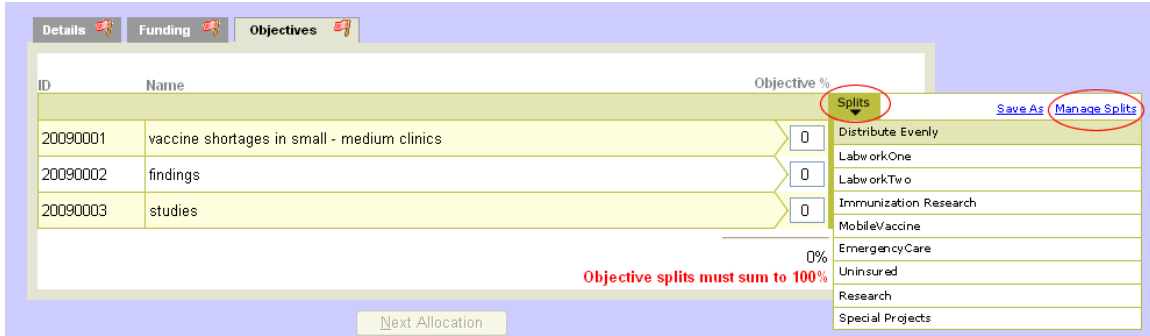
6. Select Save. Upon a successful save, the list of objectives will disappear and you will see the initial “Manage Splits” menu with a confirmation message:



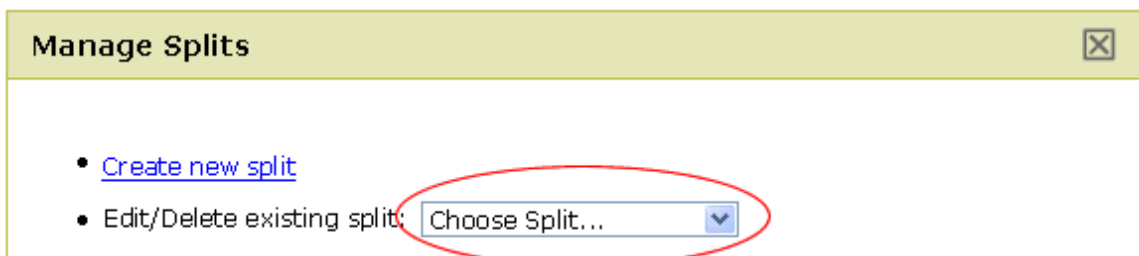
You may go through the process again to create more split sets or make a new selection from the menu. When you are finished, select the X at the top right to close the Manage Splits window.

D. Edit Split Sets using Manage Splits

1. From the Objectives tab, access the “Splits” menu. To utilize the menu, move your mouse cursor over the “Splits” label. A drop-down menu will appear with a “Manage Splits” link on the top right.



2. Select the Manage Splits link. The pop-up window of the “Manage Splits” menu will appear. In order to Edit, you must select the name of the split you will be editing. To the right of the text “Edit/Delete existing split:” there is a drop-down select labeled “Choose Split...” (circled in red, below).



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- Click on the “Choose Split” drop-down and select the name of the split you wish to edit. A list of all the objectives appear, with the current % values for the saved split already filled in and visible at the top of the list and with the name of the split set already filled in within the “Save split as name:” field at the bottom of the list (see areas circled in red, below).

Manage Splits: Edit/Delete
✕

- [Create new split](#)
- Edit/Delete existing split: Immunization Research [Delete this split](#)

ID	Name	Objective %
20090001	vaccine shortages in small - medium clinics	60
20090002	findings	40
20090003	studies	0
20090004	research	0
20090005	education	0
20090006	vaccines for uninsured families	0
20090007	objective seven	0
20090008	objective eight	0
20090009	objective nine	0
20090010	objective ten	0
20090011	objective eleven	0
20090012	objective twelve	0

100 %

Save split as name: Immunization Research
Save

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- Make any desired changes to the Objective % values for the split set (remember that if you do not initially see all the objectives, you may scroll through the objectives using the scrollbar on the right). Below is an example of the imaginary split set "Immunization Research" edited from a 60-40 split to a 60-30-10 split.

Manage Splits: Edit/Delete ✕

- [Create new split](#)
- Edit/Delete existing split: Immunization Research [Delete this split](#)

ID	Name	Objective %
20090001	vaccine shortages in small - medium clinics	60
20090002	findings	30
20090003	studies	0
20090004	research	0
20090005	education	0
20090006	vaccines for uninsured families	0
20090007	objective seven	0
20090008	objective eight	0
20090009	objective nine	10
20090010	objective ten	0
20090011	objective eleven	0
20090012	objective twelve	0

100 %

Save split as name: Immunization Research

Save

- Note:** While it is possible to save a split set that does not sum to 100%, it will cause discrepancy errors for any allocation the split set is applied to until it is edited to sum to 100%, so to avoid confusion it is recommended that any split sets sum to 100% before saving.

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5. Select "Save" to overwrite the previous values of the split set being edited with the new ones you have chosen. The system will display a confirmation message and ask if you are sure you wish to change the values. If you are sure, select "OK."

Note: If you change the % split of an existing split set, the system will automatically *update the % distributions of all allocations using that split set.*

6. Upon a successful save, the list of objectives will disappear and you will see the initial "Manage Splits" menu with a confirmation message:

Manage Splits
✕

Your split, "Immunization Research," has been successfully edited!

- [Create new split](#)
- Edit/Delete existing split: Choose Split... ▼

E. Create a New Split Set Based on an Existing Set Using Manage Splits

1. Follow Steps 1-4 for "Editing Split Sets Using Manage Splits," selecting the split you wish to base a new one on from the drop-down.
2. Prior to saving, change the name in the "Save split as name:" text box to the name you desire for your new split set.

Note: Make sure the name you type in is not already in use within the system. If the name you type in is already in use, the system will ask for confirmation to overwrite the split set with that name (see the note under #5 in "Editing Split Sets Using Manage Splits")

3. Select "Save." Upon a successful save, the list of objectives will disappear and you will see the initial "Manage Splits" menu with a confirmation message:

Manage Splits
✕

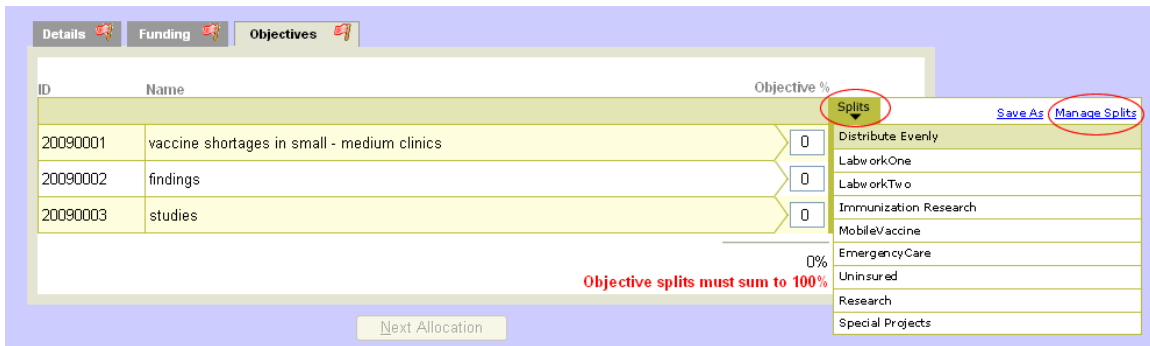
Your split, "Immunization Research," has been successfully created!

- [Create new split](#)
- Edit/Delete existing split: Choose Split... ▼

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F. Delete Split Sets

1. From the Objectives tab, access the “Splits” menu. To utilize the menu, move your mouse cursor over the “Splits” label. A drop-down menu will appear with a “Manage Splits” link on the top right.



The screenshot shows the 'Objectives' tab in the eGrATIS application. It features a table with columns for ID, Name, and Objective %. The table contains three rows of objectives. To the right of the table is a 'Splits' menu with a list of split types. A red circle highlights the 'Splits' label, and another red circle highlights the 'Manage Splits' link in the top right corner of the menu.

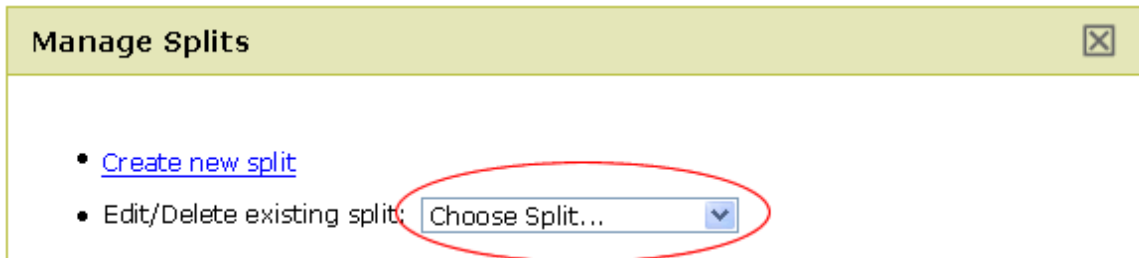
ID	Name	Objective %
20090001	vaccine shortages in small - medium clinics	0
20090002	findings	0
20090003	studies	0

Objective splits must sum to 100%

Next Allocation

Splits menu options: Distribute Evenly, LabworkOne, LabworkTwo, Immunization Research, MobileVaccine, EmergencyCare, Uninsured, Research, Special Projects.

2. Select the Manage Splits link. The pop-up window of the “Manage Splits” menu will appear. In order to Delete, you must select the name of the split you will be deleting. To the right of the text “Edit/Delete existing split:” there is a drop-down select labeled “Choose Split...” (circled in red, below).



The screenshot shows the 'Manage Splits' pop-up window. It has a title bar with a close button. Inside, there are two main options: 'Create new split' and 'Edit/Delete existing split:'. The 'Edit/Delete existing split:' option is followed by a drop-down menu labeled 'Choose Split...'. A red circle highlights this drop-down menu.

Manage Splits

- [Create new split](#)
- Edit/Delete existing split: Choose Split...

3. Click on the “Choose Split” drop-down and select the name of the split you wish to delete. A list of all the objectives appear, with the current % values for the saved split already filled in and visible at the top of the list and with the name of the split set already filled in within the “Save split as name:” field at the bottom of the list.

At the top right of the objectives list, you will see a link labeled “Delete this split” (see area circled in red, below).

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Manage Splits: Edit/Delete
✕

- [Create new split](#)
- Edit/Delete existing split: Immunization Research ▼

[Delete this split](#)

ID	Name	Objective %
20090001	vaccine shortages in small - medium clinics	60
20090002	findings	30
20090003	objective nine	10
20090004	research	0
20090005	education	0
20090006	vaccines for uninsured families	0
20090007	objective seven	0
20090008	objective eight	0
20090009	studies	0
20090010	objective ten	0
20090011	objective eleven	0
20090012	objective twelve	0

100 %


Save split as name: Immunization Research

Save

4. Select the “Delete this split” link.
 5. The system will ask for confirmation since this action is irreversible. Select OK.
- Note:** The currently selected split set is deleted from the database, and all allocations associated with that split set have that association removed but retain their current percent distributions.

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6. Upon successful deletion, the split details will disappear, and you will see the original "Manage Splits" menu with the following message:

Manage Splits 

Your split, "Immunization Research," has been successfully deleted.

- [Create new split](#)
- Edit/Delete existing split: 